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ABSTRACT

Study results concerning the preceived functioning of program specialists and resource specialists employed in California special education programs are presented. Attention is also directed to the intended roles of the specialists as defined in law, the state master plan, and other policy documents. Questionnaire data from 97 program specialists, 1,006 resource specialists, and 257 other school personnel from 20 Special Education Services Regions (SESRs) in California were analyzed. Case study interviews were also conducted with 6 program specialists, 20 resource specialists, and 69 other school personnel and parents in six SESRs. Information was obtained on personal and role demographics and the following questions: whether perceived activities and functions of program and resource recipients are being served; whether the specialists are well prepared to perform the intended role; how the specialists' roles relate to other professional roles in the educational system; what specific organizational, personal, or role demographics variables influence perceived role functioning; whether the specialists' functioning levels are effective; what problems are impeding effective role functioning; and what changes in role and responsibility are needed to increase effectiveness. The findings and recommendations of this investigation are presented in detail, and appendices include survey forms, case studies, and information on the roles of the specialists. (Author/CEW)

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Special Education Research Institute

Graduate School of Education

University of California, Santa Barbara

January 1982

Foreword

This research study was conducted pursuant to a grant from the California State Department of Education, Office of Special Education, for the period July 1, 1980 to June 30, 1981. **The findings and conclusions of the study are the sole responsibility of the investigators and do not imply the official position or endorsement of the California State Department of Education or the University of California, Santa Barbara.**

Special thanks are extended to Bob Elmore and Bruce Barnett for their assistance in instrument development. Thanks go also to Larry Schram, Richard Windmiller, Suzi Durkin, and Richard Morrison for their facilitation of our pilot test efforts. We also recognize with much appreciation all of the RLA Directors, program specialists, resource specialists, and other school personnel who gave of their time to participate in the data collection process. Joseph Adler, Matt Cross, Irene Fitz, Rosalba Gonzalez, Bruce Keogh, Barbara Lagerquist, Martin Perlman, and Pamela Weidner provided able assistance as coders and Chad Sivasalem conducted the data analyses. Special thanks to Jovita Huerta for her efforts in the final phase of report preparation. Finally, Sue Mitchell deserves particular recognition for her untiring and excellent preparation of this manuscript.

EXECUTIVE SUMMARY

The purpose of this study was to generate information to clarify the actual functioning of program specialists and resource specialists compared to intended roles as currently defined in law and other policy documents. Multiple types of data were collected to address the questions of the study. Specifically, questionnaires and interviews were utilized to measure perceived role functioning by school personnel who work with, or have an interest in, special education programs; and the perceptions of program and resource specialists actually filling the roles with regard to the tasks they perform. Data from the various sources were triangulated and convergent validity assessed.

The questionnaire sample included all program and resource specialists and a stratified random sample of other school personnel from 20 Special Education Services Regions (SESRs) throughout California. Data from 97 program specialists, 1006 resource specialists, and 257 other school personnel were collected and analyzed. A stratified random sample of personnel in six Special Education Services Regions operating under the Master Plan was drawn for the on site ethnographic phase of the study. Case study interviews were conducted with six program specialists, 20 resource specialists and 69 other school personnel and parents in the six SESRs. Summaries of results are presented for each respondent group.

PROGRAM SPECIALIST - SUMMARY OF RESULTS

Personal Demographics

- Program specialists are predominantly female (74%) and Anglo (89%).
- While 36% of the program specialists frequently encounter non-English speaking handicapped students in their work, only 13% are bilingual. Program specialists identified 30 different languages spoken by students, but reported only 6 languages that they themselves speak in addition to English.

Role Demographics

- Nearly half of the program specialists have no supervisory responsibility. Of those who do supervise others, the largest percentage report responsibility for special class teachers (29%), resource specialists (26%) and instructional aides (20%).
- Over half (56%) of the program specialists serve only 1 district; 32% serve between 2-10 districts. They work in many schools in these districts, with 10 being the most frequently reported number. Twenty-six percent work in 11-20 schools; 10% work in more than 40 schools.
- Program specialists travel an average of 134 miles per week; 10% travel between 251-500 miles per week for job related activities.
- Over half (52%) of the program specialists work more than 40 hours/per week on the job.
- Nearly half (43%) of the program specialists work on a teaching salary schedule, with 38% on an administrative salary schedule. None of the specialists makes less that $15,000 per year; 45% are in the $25,000-30,000 salary range.

Training and Experience

- Program specialists hold a variety of regular and special education credentials including: elementary credential (37%), secondary (13%), administration/supervision (33%), Pupil Personnel Services (10%), LH (37%), CH (5%), SH (14%), PH (2%).
- Over a third of the program specialists (39%) hold a master's degree; 5% have a doctorate.
- Nearly half (49%) of the specialists have experience as a special education teacher, 21% have taught in regular education programs.
- In general, program specialists feel they have received either formal training or job related experience which provided them with the skills they need for their job.

Role Functioning

- Nearly half (43%) of the program specialists believe they have major responsibility for the overall management of a student's case from referral through placement and review of progress.
- While more than half (55%) of the specialists have major responsibility for coordination, consultation, and/or program development in the LH area, many fewer have major responsibility for CH (19%), PH (10%), and SH (18%) programs. About half have at least some responsibility in career-vocational (53%) and preschool handicapped (44%) areas.

- A majority of program specialists report having daily contact with handicapped students (53%) and special class teachers (67%). About half have daily contact with resource specialists (49%) and special education administrators (42%).

- Very few specialists work with handicapped students either one at a time (1%) or in small groups (2%).

- Program specialists have contact with an average of 31 handicapped students, 6 resource specialists, 7 parents, 6 DIS instructors, 5 principals, 4 regular teachers, 6 school psychologists, and 8 special class teachers during a typical week.

- Over the course of the school year, program specialists spend most of their time in placement, student review, instructional planning and staff development activites. About half spend less than 5% of their time on assessment, on program development, or on program review. Thirty-one percent spend no time in instruction; 41% spend no time in research.

- Ninety percent of program specialists engage in developing IEPs 1-2 days per week.

- Routine activities such as completing forms, writing reports, travel and phone communications occur very frequently as part of program specialists' work.

- Over half of the program specialists feel they should be spending more time in ongoing consultation with teachers (56%), in modifying regular education programs for ineligible students (53%), in working with other personnel to develop and implement innovative programs (71%), and in research activities (51%).

- Program specialists view their role and responsibilities as distinctly different from most other personnel. School psychologists and special education administrators are the individuals with whom there is the most perceived overlap, and with whom program specialists perceive role conflict.

Job Satisfaction/Problems

- A majority (54%) of the program specialists are at least quite satisfied with their work; only 2% are dissatisfied.

- Program specialists see themselves as extremely effective with special class teachers (25%), resource specialists (31%), handicapped students (33%), and parents (27%).

- Program specialists view the most significant barriers to carrying out their job requirements as lack of time, lack of authority and too large of a caseload.

- While 27% of program specialists are satisfied with the current definition of the role and responsibilities, 44% would make changes in the program specialist role. The most significant changes include increased authority and better definition of responsibilities.

- Nearly three fourths (73%) of the program specialists think there should not be a special credential for program specialists.

RESOURCE SPECIALIST - SUMMARY OF RESULTS

Personal Demographics

- Resource specialists are predominantly female (80%) and Anglo (92%).

- Seventy-nine percent of resource specialists have at least occasional contact with non-English speaking or limited English speaking handicapped students; 14% are bilingual. Forty-eight different languages are spoken by LEP/NEP handicapped students with 21 languages being spoken by bilingual resource specialists.

Role Demographics

- Most resource specialists (86%) have one aide. Three percent have no aide.

- The majority of specialists work in one district (98%) and one school (89%), with 1% serving between 3-10 schools and 1% serving 11-20 schools.

- The majority of resource specialists are full-time; 7% are employed half-time. Twenty-two percent indicate they spend an additional ten hours per week on the job.

- Virtually all resource specialists (97%) are on a teaching salary schedule. Forty-three percent earn $20,000-24,999 per year and 35% are in the $15,000-19,999 bracket. Twelve percent make $25,000-30,000 per year and only 1% have a salary under $10,000 per year.

- Many resource specialists have non-instructional duties, such as, playground supervision (41%), bus/lunch supervision (20%) and building committee assignments (42%).

Training and Experience

- Resource specialists hold a wide range of regular and special education credentials including: elementary credential (78%), secondary (28%), administration/supervision (11%), pupil personnel services (7%), reading specialist (7%), general special education (12%), LH (81%), SH (8%). Fewer than one percent hold PH, CH or speech credentials.

- Over two-thirds of the resource specialists (69%) hold a master's degree; 1% have a doctorate.

- Nearly all the resource specialists (95%) have experience as a special education teacher. Seventy-seven percent have been regular education teachers.

- Most resource specialists feel that their formal training and job related experience has adequately prepared them with the skills they need for their job.

Role Functioning

- The average resource specialists has contact with 24-28 handicapped students a week; has 5 or more sessions per student, with each session lasting 46-60 minutes. Sixty-eight percent indicate that their monthly caseload is between 24-28. Twenty percent work with fewer than 24 students a month and 11% work with more than 28 students. Eighty students is the largest number reported to be served by resource specialists.

- In addition to daily contact with students, a majority of resource specialists have daily contact with regular class teachers (81%) and principals (63%) and have contact 1-2 time per week with parents (62%), psychologists (59%) and DIS instructors (49%).

- Over half of the resource specialists (55%) have contact with a program specialist during a typical week, while a third (35%) have no weekly contact with a program specialist. The average resource specialist interacts with 2-4 parents, 10-15 regular class teachers and 1-2 DIS instructors per week.

- The majority of resource specialists say they have either full (62%) or major (35%) responsibility for the overall management of a student's case from referral through placement and review of progress.

- Over the course of the school year, resource specialists spend most of their time in assessment, instructional planning and instruction. A third (35%) spend more than 50% of their time in instruction.

- In the referral process, two-thirds of the resource specialists are involved at least 1-2 days a week receiving and screening referrals made by other school personnel (66%) and coordinating and monitoring referral procedures (69%).

- Eighty-nine percent of resource specialists engage in conducting formal and/or informal assessments of students at least 1-2 days per week. Seventy percent are involved at least 1-2 days a week in coordinating assessment procedures, 85% frequently assist parents and others in interpretation and utilization of student assessment findings.

- Eighty-one percent of resource specialists are involved at least 1-2 days a week in coordinating the development of IEPs for handicapped students, and 69% spend that much time participating with the IEP team in making placement recommendations. Ninety-five percent provide direct instruction at least 1-2 days a week, 88% daily, and 94% at least frequently supervise instruction by resource specialist aides. During their instructional time each day, 48% work with students one at a time (another 23% work one-to-one at least 1-2 times a week) and 86% work with small groups of handicapped students.

- Three-fourths of the resource specialists (77%) engage in review of student progress and revising of IEPs at least 1-2 times a week.

- A third of the resource specialists frequently engage in informal staff development activities with regular teachers. However, 73% rarely or never coordinate inservice workshops.

- Most of the resource specialists engage in routine activities as part of their daily and weekly functioning. Ninety-four percent say they complete forms and write reports at least 1-2 times a week, 54% engage in these activities daily. Nearly half (47%) have telephone communications as part of their daily professional activities. Thirty-eight percent report participating in meetings not directly related to their classroom responsibilities at least 1-2 times a week.

- Resource specialists are generally satisfied with the way in which their time is distributed over various activities related to role functioning. However, 51% would like to spend more time consulting with teachers in the utilization of evaluation data for modification of instruction. A third (36%) would like to spend more time consulting with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students, as well as coordinating the implementation of the activities of the resource specialist program with the regular classroom curriculum. Thirty-five percent would like to spend more time working one-to-one with handicapped students. Forty percent would like to spend more time in the development of vocational plans for handicapped students.

- Nearly half of the resource specialists would like to spend more time providing both formal and informal staff development activities, and participating in innovative program development activities. Additionally, they would like to spend more time assisting parents, both in understanding the program being provided to their children and in the effective utilization of other community resources besides the school. Fifty-eight percent would like to spend less time on paperwork and 33% view less time spent in meetings not directly related to classroom responsibilities as desirable.

- Resource specialists view their responsibilities as distinctly different from administrators. However, many perceive overlap with DIS personnel (50%), school psychologists (58%), special class teachers (41%), and regular class teachers (60%). Some role conflict is seen as existing with regular class teachers (38%) and with school psychologists (24%).

Job Satisfaction/Problems

- Nearly three-fourths (74%) of the resource specialists are at least quite satisfied with their work; only 5% are not satisfied.

- Resource specialists perceive themselves to be extremely effective with handicapped students (48%), principals (27%) and parents (24%). They feel they are least effective with special class teachers.

- Problems which are perceived to impair fulfillment of job requirements focus primarily on lack of time and too large of a caseload.

- Seventy percent of resource specialists would like to see changes in the role and responsibilities. Primarily, recommendations focus on less paperwork, smaller caseload and more time for instruction and curriculum development as well as a better definition of responsibilities.

o Thirty-five percent of resource specialists agree with the requirements of the Resource Specialists Certificate of Competence. Twenty-six percent disagree with the requirements and 31% are not familiar with the requirements.

SCHOOL PERSONNEL - SUMMARY OF RESULTS

(School personnel include elementary teachers, special education teachers, DIS personnel, instructional aides, school psychologists, principals, and special education administrators.)

Contact/Familiarity with Special Education

o Nearly half (45%) of the school personnel reported being very familiar with PL 94-142; 31% are very familiar with AB 1250 and 33% are very familiar with SB 1870.

o Sixty-four percent of the school personnel have daily contact with handicapped students and only 7% never have contact with such students. Forty percent have daily contact with special education personnel other than program and resource specialists.

o Very few professionals reported daily contact with program specialists. Over half of the respondents never or very rarely see program specialists. When there is contact, it is most frequently during referral (17%), placement (18%) and review (16%) activities.

o In general, school personnel reported more contact with resource specialists than program specialists. Referral activities are the area of more frequent contact, with 51% reporting interaction with resource specialists at least 1-2 times a week during the referral process. Placement and review are other areas of frequent contact. Twenty-five percent reported they never have contact with resource specialists during assessment, 22% never interact during instructional planning, and 20% never interact with resource specialists when instructional plans are being implemented.

Views on Work of Program and Resource Specialists

o In general, a larger percentage of professionals are unfamiliar with the work of program specialists than with resource specialists' work.

o School personnel view resource specialists as having major responsibility for delivery of a variety of services to handicapped students. Two-thirds (69%) view resource specialists as having major to full responsibility for the overall management of a student's case. Instructional planning (76%) and review (75%) are the areas where the largest percentage of resource specialists are seen as having major to full responsibility. Instruction is the area where the largest number of school personnel (30%) view resource specialists as having full responsibility.

o Program specialists are viewed as having at least some responsibility in all service delivery areas. The areas where program specialists are most frequently seen as having major to full responsibility are placement

(43%) and review (32%). Twenty-seven percent of the school personnel perceived program specialists as having major to full responsibility for the overall management of a student's case.

- Program specialists are viewed as having responsibilities which overlap with most other school personnel. The most frequently identified overlap is with special education administrators (44%) and resource specialists (38%).

- Resource specialists are seen as having overlapping responsibilities with most other instructional personnel including regular classroom teachers (62%), DIS instructors (44%), and special class teachers (49%). The roles of program specialist (41%) and school psychologist (41%) are also viewed as overlapping with the resource specialist role.

- Perceived overlapping responsibilities do not seem to relate to major role conflict. For program specialists there is "some" perceived conflict with resource specialists (28%), special education administrators (26%) and school psychologists (25%). For resource specialists, school personnel perceived "some" conflict with regular class teachers (40%), school psychologists (30%), DIS personnel (27%), program specialists (26%), and special class teachers (24%).

Effectiveness/Satisfaction

- In general, both program and resource specialists are perceived as being effective in providing needed services.

- Over half of the school personnel feel that program specialists provide leadership, and effectively coordinate the programs for which they are responsible. Program specialists are seen as providing useful input in the development of IEPs, and as playing a beneficial role in providing appropriate educational services to handicapped students. Program specialists are viewed as most effective with resource specialists (42%), special class teachers (41%) and handicapped students (41%).

- Criticism of program specialists includes: efficiency of services, not enough time spent evaluating effectiveness of programs for handicapped students, and not enough inservice provided to keep staff updated on educational changes. Nineteen percent of the school personnel view program specialists as not effective with regular classroom teachers.

- Sixty-one percent of the school personnel think that program specialists should be advocates for the educational rights of handicapped students.

- A large majority of school personnel feel that resource specialists are extremely effective with handicapped students (70%), parents (70%), and regular classroom teachers (65%). In addition to expertise in instruction, resource specialists are seen as providing helpful consultation, resource information, and materials. Resource specialists are seen as providing services which regular classroom teachers do not have time, opportunity, or skills to provide.

- Forty-four percent of school personnel think resource specialists should not work only with students who are placed in special education programs.

- In terms of barriers to carrying out job requirements cited by program specialists, 29% of school personnel agree that program specialists do not have enough time to perform their duties, 38% agree that program specialists should have smaller caseloads, but only 15% think that these specialists do not have enough authority.

- Fifty-three percent of the school personnel agree with resource specialists that they should have smaller caseloads and 39% agree that resource specialists do not have enough time to perform their duties.

- Sixty-three percent of the school personnel are personally satisfied with program specialists services, and 50% think program specialists are needed for the successful implementation of the Master Plan.

- Seventy-eight percent of the school personnel are personally satisfied with services received from resource specialists, and 79% think resource specialists are needed for the successful implementation of the Master Plan.

SUMMARY OF POLICY AND PROGRAM RECOMMENDATIONS

Separate policy and program recommendations concerning the program and resource specialist roles were made. For program specialists, recommendations primarily focused on the need for greater clarity of responsibilities required for the role. Variation in actual functioning of program specialists throughout the state made generalizations difficult. Such variation, however, highlighted the necessity for the determination of appropriate role functioning to be made at the local SESR level to meet unique needs present in differing educational situations. The state department should provide guidelines to the SESRs for conducting an analysis of their own service delivery needs. In addition, guidelines for options in program specialist functioning, including requisite training appropriate for different role responsibilities, should be provided.

Resource specialists throughout the state functioned in a similar manner across sites, although there was some local variation. Recommendations for resource specialists focused on clarifying the nature of specific functions and prioritizing the responsibilities for the role. Specifically, the assessment and staff development functions need to be more clearly defined, and determination of the appropriate combination of instruction and other responsibiities (such as coordination) delineated. Other recommendations include the need for the state deparment to conduct analyses of appropriate caseload requirements; of possible difference in functioning at elementary and secondary levels; and of hiring practices for resource specialist aides. Suggestions are made for clarifying instructional responsibilities of various personnel for handicapped students, including coordinating scheduling requirements as part of IEP team responsibilities. Finally, specific preservice and inservice training opportunities to improve resource specialist functioning should be provided.

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PART I

Introduction

California has a long history of commitment to providing innovative programs and services to meet the educational needs of handicapped children. Since 1860, with the establishment of programs for deaf and blind children, a variety of programs has been implemented and modified. The growth of special education was frequently on an "as needed" basis resulting, by the early 1970's, in the existence of 28 separate programs to meet the needs of handicapped children (CSDE, 1980). This categorical approach did not include mechanisms for coordinating eligibility requirements and services, nor were there requirements for evaluation of programs toward improvement in services. Assembly Bill 4040, enacted in 1974, represented the culmination of efforts of the educational community to change the service delivery system in California. This innovative pilot program - the California Master Plan for Special Education - was implemented by 6 local organizational units in 1975-76 and an additional four were added during 1976-77.

In 1977, Assembly Bill 1250 (amended in 1978 by A.B. 3635) authorized state wide implementation of the Master Plan by 1981-82. Then, in response to Assembly Bill 8 of 1979 (a "sunset law"), a review of special education programs was conducted by the legislature. The results of that review are embodied in SB 1870 and its various trailer bills passed in 1980. SB 769 (signed into law in October, 1981) is the most recent legislation which modifies the Master Plan.

The California Master Plan represents a comprehensive service delivery model that meets federal requirements contained in P.L. 94-142 and P.L 93-112. In many areas the Master Plan exceeds federal requirements in specificity or scope. One such area is the establishment of important new roles in special education such as the roles of the resource specialist and program specialist. These personnel are designated in the original Master Plan "...to assist in the development, implementation, and review of individualized educational plans so as to ensure that the educational program for each pupil is appropriate to that individual's needs and abilities." (C.S.D.E., 1976, p. 3) While current law provides more detailed descriptions of intended services to be provided by these individuals, comprehensive review of the resource specialist and program specialist roles separately and in relation to each other is lacking. Questions concerning efficiency, effectiveness and appropriateness of these two roles have been raised as part of the legislative review process (Legislative Analyst, 1977; Auditor General, 1980; C.S.D.E., 1980). It is towards the provision of information concerning the functioning of program specialists and resource specialists to assist state and local decision makers that the current study was undertaken.

The mandates of P.L. 94-142 and the California Master Plan represent a national commitment to equality and quality of educational services for handicapped children. The translation of the "promise" into "reality," however, has created considerable requirements for organizational change in local educational agencies from administrative through service delivery levels.

Study of educational change and adoption of innovation has generated both enthusiasm and controversy in the past decade. After many unsuccessful research, development, adoption, and diffusion efforts in the 1960s, professional educators from a variety of perspectives have begun to address questions of the conditions that facilitate or impede effective educational change. Rodgers and Shoemaker (1971) have considered the differential consequences and patterns of mandatory as opposed to voluntary participation in change efforts and have noted that in the case of comprehensive policy change (such as the implementation of a legislative mandate), the only options involve the method of implementation.

Many writers have focused on obstacles to change in the schools with emphasis on the role of such variables as: (1) formal and informal social structure and role regularities in the schools (Sarason, 1971; Lortie, 1975); (2) bureaucratic structures (Lipset, 1961; Lipsky, 1976; Pincus, 1974) including the incompatibility of prior organizational arrangements with the requirements of the innovation; (3) state of skills and knowledge on the part of implementation personnel (Fullan & Pomfret, 1977; House, 1974; Gross et al., 1979); and (4) clarity about the nature of the proposed innovation (Pincus, 1974; Gross et al., 1979).

Emrick and Peterson (1977) report findings from several studies suggesting that implementation of innovations is futile unless efforts are initiated at the local level. However, for the most part, service delivery personnel have not been involved in determining the course of official special education policy through passage of federal and state legislation. Findings of a recent study conducted by Weatherley and Lipsky (1977) suggest that school personnel are actually constrained by legislation rather than directed in their work. These investigators propose that service delivery personnel are really "street level bureaucrats"--setting policy by their own interpretation of what has come from above and of the realities of their current personal-professional situations. While it is important that studies on the implementation of the California Master Plan focus on the extent to which these implementation activities are congruent with legislative requirements, an exclusive focus on compliance issues precludes consideration of local variations in actual functioning which may be adaptive for providing quality educational services and which may form a basis for changes in policies which reflect practitioner concerns. Thus, in the present study, extent of congruence of current functioning of program specialists and resource specialists with legislative requirements is only one of several indicators of the success of implementation efforts. Credence is also given to variations in functioning which can be demonstrated to have operational significance.

The literature on role theory provides a rich framework for analyzing how professionals conceive of the program and resource specialist roles, singularly and in conjunction with others in the implementation of Master Plan requirements. Deutsch and Krauss (1965) suggest several aspects of role which have been modified for the present project: 1) prescribed or intended role, 2) enacted or perceived role, and 3) subjective or idealized role. The "intended" role is defined as the system of expectations which exist for the occupant of a position. In the present study these expectations include the following: 1) legal requirements for qualifications and responsibilities as specified in the Education Code and through administrative regulations, and 2) "policy" reviews conducted by the Special Education Commission of the State Board of Education and the State Department of Education.

"Perceived" role functioning includes both the understanding of a role by individuals who work with, or have an interest in, special education programs and the perception of those actually filling the role with regard to the tasks they perform. The "idealized" role is a statement of what individuals believe should be the responsibilities of those in particular roles. The analytical scheme for the present study includes determining the nature of the match between intended and perceived roles and the extent to which an idealized role as proposed by the specialists differs from intended and perceived functioning.

Study Questions

Questions addressed in the study focus on role definition and appropriateness of role performance. The general question of the study is:

Does perceived role functioning of program and resource specialists match intended role functioning? Specific questions include:

1.0 Do perceived activities and functions of program and resource specialists match intended activities and functions.

2.0 Are the intended recipients being served?

3.0 How well prepared are program and resource specialists to perform the intended roles?

4.0 How is each specialist role perceived to relate to other professional roles in the educational system?

5.0 What specific organizational, personal, or role demographic variables influence perceived role functioning?

6.0 How effective is the perceived functioning of the specialists?

7.0 What problems are perceived as impeding effective role functioning of specialists?

8.0 What changes in the specialists' roles and responsibilities are needed to increase effectiveness?

The following section describes the methods used to answer the eight questions which served as the focus of the study.

Method

The study was designed to compare the role requirements for intended functioning of program and resource specialists with actual role functioning of these specialists. Intended role requirements were identified through descriptions in various policy documents (Education Code Sections 56333, 56334, 56335 of AB 1250, Education Code Sections 56368, 56362, 56363, 56341 of SB 1870, California Administrative Code Title V proposed regulations; Advisory Commission on Special Education's Personnel Development Committee report on program specialists, the Commission for Teacher Preparation and Licensing regulations for the Resource Specialist Certificate of Competence and the California State Department of Education "sunset" review of special education). Requirements for functioning have been analyzed in two ways. First, the five areas necessary for delivery of services to individuals with exceptional needs (referral and identification, assessment, IEP planning and placement, implementation, and review) were identified and translated into specific statements of direct and indirect services to other professionals, parents, and handicapped students. Secondly, the functions prescribed for each role (e.g., consult, assist, coordinate, etc.) and activities supporting each function were identified and operationalized.

The measurement of goal attainment related to effective role performance involves determination of the degree of congruency between requirements for functioning and actual functioning of program and resource specialists. Measures used in this study relate to six broad criteria proposed by Suchman (1967) and Scriven (1967). An effort criterion is typically concerned with the assessment of input (e.g., hours, numbers served, etc.), regardless of output; performance or effect criteria measure the results of effort rather than the effort itself; adequacy of performance criteria refers to the degree to which effective performance is adequate to the total amount of need; efficiency is concerned with the evaluation of alternative methods in terms of costs (e.g., a ratio between effort and performance), process refers to the attributes of a program which contribute or detract from the effect of the program; and value relates to the satisfaction of those delivering and receiving the services. Specifically, effort, adequacy of performance, process and value criteria were used for the present study.

Data have been collected on the role as perceived by others who work with the identified professionals, and of the services each specialist perceived him or herself actually delivering. Specialists were also asked to provide information on idealized role functioning. In addition, demographic information concerning the role and the background, training, and experience of practicing professionals (program specialists or resource specialists) was collected. Based on these data, discrepancies or variations in intended and perceived functioning were identified (strengths and weaknesses of alternative modes of functioning were delineated) and recommendations for policy and program measures which could be taken to improve the effectiveness of the program and resource specialist roles were offered.

The study design includes a multiple sources data collection system to allow for different levels of analysis. Specifically, a questionnaire survey research paradigm modeled after Dillman (1978) and ethnographic procedures derived from the work of Glaser and Strauss (1967), Patton (1980), and Schatzman and Strauss (1973) were used in the study. Two questionnaires were developed which identified the background, training, experience, and perceptions of functioning for both program specialists and resource specialists. These instruments were distributed to nearly 2000 program specialists and resource specialists from the Special Education Services Regions (SESR) functioning under the Master Plan during the 1979-80 school year. A similar questionnaire was distributed to over 500 administrators, teachers and ancillary personnel in these SESRs. Nearly fourteen hundred questionnaires were returned. Analysis of these data permit description of similarities and differences among these professionals and their perceptions of the activities and functions of program and resource specialists.

In order to address the more complex issues related to variations in actual functioning, however, a case study analysis of variables influencing such functioning has been conducted. This analysis included a subsample of Special Education Services Regions (SESRs), selected on the basis of geographic location, urban/rural, consortium/single district, length of time operating under Master Plan, and other pertinent variables. A sample of ninety-five program specialists, resource specialists, administrators, teachers, ancillary personnel, and parents were interviewed, on site, concerning perceived problems and successes in implementing the legislative intent related to the roles of program specialists and resource specialists. Variables such as organizational structure, interface with other professionals, specialization of functions and activities, differences in functioning at elementary vs. secondary levels, and ongoing training opportunities which may influence service delivery operations have been identified and studied. While generalization from results of the study of a limited number of SESRs must be made with caution, analyses allow inferences concerning personal-professional variables and local factors which are related to degree of perceived successful functioning in these various settings. Using a triangulation of evidence model (Denzin, 1978), comparisons were made between the intended (prescribed) role functions and data collected through questionnaires and interviews on the self-role perception and perceptions of others.

Sample Selection for Questionnaire Data

The target sample for the study included all twenty-one SESRs operating under the California Master Plan for Special Education during the 1979-80 school year. Initial sample selection activity focused on gaining access to the entire population of program and resource specialists in these SESRs in order to request their participation in the questionnaire phase of the study. After contacting RLA Directors personally and by letter, demographic, organizational, and program information about the SESRs was collected. This information was used for sample selection in both the questionnaire and case study facets of the study.

Information was collected on the total number of school personnel in each SESR who had contact with children with exceptional needs, including special education teachers, designated instruction and services personnel, aides, school psychologists, special education administrators, principals, regular class teachers, resource specialists, and program specialists. After tallying all the numbers received, it was decided that a representative sample would be five percent of the individuals in each category, selected randomly. There were three exceptions to this 5% criterion. Special education directors were exempted due to the small number in their category and their influence on district policies; 10% of this group was contacted. All program and resource specialists were contacted. Their limited number made this feasible. This procedure resulted in the identification of a sample including 228 program specialists, 1710 resource specialists, and 533 other school personnel.

Although the project began with the intention of studying all twenty-one SESRs, only 20 were subsequently included. One SESR declined to participate because of the numbers of studies they had been part of in the past. They felt "over-studied."

Questionnaire Development

The first task in instrument development was an analysis of roles and functioning of resource specialists and program specialists as described in law, the Personnel Development Committee's report on program specialists and the Commission for Teacher Preparation and Licensing regulations for resource specialists (see Appendix C). This analysis resulted in a set of descriptors both of activities and functions which have been used to frame item development for questionnaires and interview schedules. The next task included a series of informal discussions with practicing program specialists and resource specialists regarding their roles and functioning to validate the role descriptors which had been developed. Three preliminary forms of a questionnaire were developed for collecting data on the roles and functioning of program and resource specialists. One form was designed for program specialists, another for resource specialists, and a third for all other school professionals thought to have contact with program and/or resource specialists.

The writing of the items for the questionnaires was organized through use of an analytical scheme for conceptualizing the roles and functioning of program and resource specialists. The analytical scheme was derived in general from Suchman (1967) and Scriven (1967) and includes the criteria areas of effort, adequacy of performance, process, and value.

The three forms of the questionnaires were piloted in three counties with program specialists, resource specialists and other school personnel. In addition, researcher/colleagues provided detailed feedback about the quality of the questionnaires as research instruments. Based on the data obtained from the pilot activities and colleagial feedback, the questionnaires were each revised and piloted again. Forms were submitted to the state department Data Acquisition Review Committee (DARC) for approval and were again modified (see Appendix D).

Data Collection Procedures for Questionnaire Data

Each RLA Director was requested to distribute questionnaires to special education personnel in his/her SESR. A set of postcards was sent with the questionnaires. They were to be sent by the RLA Director to the same respondents, approximately a week after the questionnaires had been delivered. The postcards thanked the respondents for their participation in the project and reminded those who had not already done so, to return the questionnaires.

Questionnaires for regular education personnel--including principals and regular classroom teachers were distributed in a different manner. A letter was sent to the Superintendent of each district, informing him or her about the project, and requesting authority to contact principals. This letter was followed by telephone contact, approximately a week later, in order to obtain formal permission to send the questionnaires directly to the schools. Some districts preferred that their special education director receive the package and disseminate the materials, others gave permission to send the questionnaires directly to the sites.

In order to minimize subjectivity and to insure as much diversity as possible, a principal was requested to distribute questionnaires to a predetermined stratified list of classroom teachers (e.g., third grade, fifth grade, etc.). There was an attempt to sample a range of grade levels in the elementary districts and as wide a variety of subject teachers as possible in the high schools.

Two thousand, four hundred and seventy-one questionnaires (2,471) were sent and approximately half of all respondents in each category replied including 97 program specialists, 1006 resource specialists and 257 other school personnel for a total response of 1360 (55%).

Sample Selection for Case Study Interviews and Observations

In the interview and observation phase of the study, school personnel were interviewed and observed in six geographic areas of California to provide in-depth information to augment the questionnaire data.

From a total of 20 Special Education Service Regions (SESR), six were selected as a representative sample, based on the following criteria: geographic location (Northern California, Southern California), population per square mile (rural, suburban, urban), type of SESR (single district, consortium, county), length of time operating under the Master Plan, and classification of program specialists (Administrative Pupil Services, Instruction, Management, etc.).

RLA Directors in each of the six (selected) SESRs were requested to participate in the case study interviews. The final sample was comprised of SESRs with the following characteristics:

1. Rural, North, Consortium, 4 years, Other Certification.
2. Rural/Urban, South, County, 2 years, Instruction.
3. Urban, South, Single, 2 years, Management.
4. Suburban/Rural, North, Single, 3 years, Mixed Credential.
5. Rural, North, County, 4 years, Administrative.
6. Urban, South, Consortium, 1 year, Pupil Services.

Participating SESRs were: Humboldt, Riverside, San Diego, San Juan, Stanislaus, and West Orange.

RLA Directors were asked to select the schools in their areas where the interviews and observation would take place. The schools selected were to reflect the general characteristics of the SESR as a whole, but with varying SES and ethnic composition. In this way, the interviewers were able to gather data about rural and urban, high and low wealth sites, as well as schools with differing proportions of minority students.

Case Study Interview Schedules Development

Two interview schedules were developed based on an analysis of the intended roles and functioning of resource specialists and program specialists as described previously (see Appendix E). One was designed for both resource and program specialists and another for other school personnel and parents who have professional contact with resource specialists and/or program specialists. The interview schedules were designed to elicit the respondents' views of these professionals in the areas of qualifications and assignment, activities, job definition, efficiency/effectiveness, training, and recommended changes.

Data Collection Procedures for Case Study Interviews and Observations

Two interviewers spent two days in each of the six SESRs. Typically, one interviewer spent one day on-the-job with a program specialist while the other interviewed and observed school personnel at a school site. On the next day, both interviewers observed and interviewed at a second school. Interviews lasted between 20 and 90 minutes; the lengthier ones generally being with resource and program specialists.

In a total of 11 elementary schools, two high schools and one continuation high school, 95 people were interviewed in the six SESRs; they included:

	N
Child Advocate	1
Diagnostic Teacher	1
Director of Special Education	3
Designated Instruction and Services	11
Parents of Handicapped Students	4
Principals, Vice Principals	11
Program Specialists	6
Psychologists	3
Regular Class Teachers	20
Resource Specialists	20
Resource Specialists Aides	4
Special Day Class Teachers	11

In addition to those individuals formally interviewed, informal discussions were held with a number of school personnel and parents.

Case study reports for each SESR were written by the two researchers after reviewing the information collected and observations made at each site. The reports are organized to provide a summary of perceived role functioning by the specialists and other school personnel as well as idealized role functioning.

PART II

Results

Results from the study are presented in three major sections. The first section summarizes the perceptions of school personnel who work with program and resource specialists. The second and third sections summarize the perception of program specialists and resource specialists of their own role functioning. The results sections are organized to present a summary of data pertaining to the questions of the study. Findings from the two data sources (questionnaire and ethnographic) are generally consistent. Ethnographic data provide elaboration and rich detail concerning specific questionnaire findings. With the exception of length of time operating under the Master Plan, none of the ethnographic sample selection variables were determined to influence perceived role functioning of program and resource specialists, so these data are not reported separately. Rather, they are incorporated into the presentation of results to clarify or augment quantitative data or to present a divergent perspective.

Complete case study reports are not included in the body of the text but can be found in Appendix B. A summary of interview respondents' perceptions of program and resource specialists functioning across the 6 SESRs in the ethnographic sample can be found in Appendix A.

School Personnel

The questionnaire sample of school personnel included 59 regular classroom teachers, 73 special class teachers, 28 DIS personnel, 24 aides, 15 school psychologists, 47 principals, and 11 special education administrators; a total of 257 questionnaire respondents. In addition, 65 school personnel were interviewed as part of the case studies. Data reported in this section are based primarily on questionnaire respondents. Information from case studies is included to clarify specific points or present divergent views. Unless otherwise noted, all tables are based on an N of 257. Because of rounding, all percentages may not total 100%. Percentages for respondents who did not answer or who felt they were too unfamiliar with the work of either program or resource specialists to provide in informed opinion are reported as Don't Know/Blank (DK/B).

Personal Demographics

Questionnaire respondents ranged in age from 25 or younger (2%) to 56 or older (9%) with roughly 30% in each ten year interval between. Sixty percent were female, 36% male. The majority were Anglo (86%) with small numbers of American Indian (2%), Asian (2%), Black (4%), and Hispanic (6%) professionals responding.

Contact/Familiarity With Special Education

In terms of laws pertaining to special education, only 13% of the school personnel were not familiar with P.L. 94-142. Forty-two percent were somewhat familiar and 45% reported being quite familiar with P.L. 94-142. A fourth of the respondents (25%) were not familiar with AB 1250 (Old California Master Plan), but only 10% were not familiar with SB 1870 (the New California Master Plan). Thirty-one percent reported being very familiar with AB 1250, and 33% are very familiar with SB 1870.

Sixty-four percent of respondents reported daily contact with handicapped students and only 7% reported never having contact with such students. Forty percent reported daily contact with special eduation personnel other than program and resource specialists. Table 1 provides information on the nature of the contact that school personnel have with program and resource specialists. Very few professionals reported daily contact with program specialists. Over half of the respondents never or very rarely see the program specialists. When there is contact, it occurs most frequently

Table 1

Frequency of contact with Program and Resource Specialists in Referral Through Review Process

(N = 257)

% having contact with:	Program Specialist						Resource Specialist					
	*N	R	O	F	D	DK/B	N	R	O	F	D	DK/B
Referral	22	32	23	17	3	4	13	15	18	28	23	4
Assessment	37	31	18	9	2	4	25	14	21	20	14	6
Instructional Planning	25	33	24	13	2	4	22	13	20	26	14	5
Placement	23	27	24	18	4	5	15	13	22	26	18	6
Instruction	34	30	22	10	1	4	20	18	18	22	17	5
Review	23	27	28	16	3	4	16	16	21	28	13	6

*N = Never - no contact whatsoever
R = Rarely - contact 1-5 times per year
O = Occasionally - contact 1-2 times per month
F = Frequently - contact 1-2 times per week
D = Daily - contact more or less daily

during referral (17%); placement (18%); and review (16%) activities.

Many individuals interviewed for the case studies felt program specialists were "spread too thin." Program specialists were seen as typically assigned a geographic area or specific grade levels. Because of time constraints, which were for the most part a consequence of the number of "units" and individuals to be contacted, program specialists were viewed as having the most frequent interactions with personnel who had "overlapping responsibilities," or employees they were required to supervise. Principals, vice principals, psychologists, resource specialists and parents were more likely to encounter a program specialist, because of their participation in some aspect of the referral to review process.

Program specialists were not perceived as available on a daily basis in any SESR visited, although in one Master Plan area program specialists visited local high schools twice a week. One of these program specialists, assigned to the school visited by the interviewers, worked more closely with the vice principal than other personnel. The vice principal was in charge of curriculum in general and the resource program in particular. He found the program specialist very helpful in areas of compliance and program development. On the other hand, a speech therapist at the same school never saw the program specialist assigned there, but was very enthusiastic about an inservice program introduced by a categorically assigned (e.g., communicatively handicapped) program specialist who specialized in working with CH personnel across the SESR. Clearly the "needs" of professionals, and their access to the services of an "available" program specialist can make a difference in both the amount of contact and degree of satisfaction expressed.

In general, school personnel reported more contact with resource specialists than with program specialists. Referral activities seem to be the area of most frequent contact, with 51% reporting interaction with resource specialists at least 1-2 times a week during the referral process. At least a third of the school personnel reported contact at least 1-2 times a week during all other phases of delivery of services. Twenty-five percent reported they never have contact with the resource specialists during assessment, 22% never interact during instructional planning, and 20% never interact with resource specialists when instructional plans are being implemented (see Table 1).

Views on Work of Program Specialists and Resource Specialists

In general, a larger percentage of professionals are unfamiliar with the work of program specialists than with resource specialists work. This fact became apparent in the interviews as well. Each person interviewed had at least some degree of knowledge of the resource specialists' role, but only some knew what program specialists' work involved. Those who were familiar with the roles of program specialists were generally special education staff or administrators (i.e., people who have continual and direct responsibilities for handicapped students). This group generally did not include regular education staff. This finding seems understandable, in light of the fact that program specialists are generally assigned to work with staff in a single specialty area (e.g., CH) or with a specified number of special education programs (e.g., resource specialist, learning handicapped). On the other hand, resource specialists are intended to interact with an entire school staff, plus special education administrators.

Program specialists are viewed as having at least some responsibility in all service delivery areas. Table 2 illustrates the perceived extent of their responsibility in specific areas. The areas where program specialists are most frequently seen as having major to full responsibility are placement (43%) and review (32%). Twenty-seven percent of the respondents perceived program specialists as having major to full responsibility for the overall management of a student's case. From interview data, the overall management activities are usually described as compliance oriented (i.e., assuring processes occur) rather than coordinating the flow of services in each individual student's case.

School personnel view resource specialists as having major responsibility for delivery of a variety of services to handicapped students. Two thirds (69%) view resource specialists as having major to full responsibility for the overall management of a student's case. Table 2 illustrates the perceived responsibilities in specific areas. Instructional planning (76%), review (75%), and assessment (71%) are the areas where the largest percentage

Table 2

Perceived Extent of Responsibility of Program and Resource Specialists for Delivery of Services in Specific Areas
(N = 257)

	Extent of Responsibility									
	Program Specialist (%)					Resource Specialist (%)				
Service Delivery Areas	*N	S	M	F	DK/B	N	S	M	F	DK/B
Referral	19	35	17	7	22	7	30	37	16	11
Assessment	23	38	15	5	20	3	16	50	21	10
Instructional Planning	18	40	16	4	22	4	11	50	26	10
Placement	6	32	35	8	19	4	27	46	12	11
Instruction	41	28	7	2	22	5	14	39	30	11
Student Review	8	42	27	5	19	3	11	54	21	11
Overall Management of Student's Case	17	36	21	6	20	6	13	47	22	12

*N = No responsibility
S = Some responsibility
M = Major responsibility
F = Full responsibility

of resource specialists are seen as having major to full responsibility. Instruction is the area where the largest percentage of school personnel (30%) view resource specialists as having full responsibility.

Table 3 provides information on the views of school personnel regarding how each specialist's role and responsibilities differs from other personnel roles. At least 20% of program specialists are viewed as having responsibilities which overlap somewhat with most other school personnel except regular class teachers. The most frequently identified overlap is with special education administrators (44%) and resource specialists (38%). Resource specialists are seen as having overlapping responsibilities with most other instructional personnel including designated instruction services instructors (44%), and special class teachers (49%). The most frequently

Table 3

Specialists' roles as seen as different, overlapping, or identical to other personnel roles. (N=257)

	Role Relationships							
	Program Specialist (%)				Resource Specialist (%)			
Personnel Roles	*D	O	I	DK/B	D	O	I	DK/B
Designated Instruction and Services Instructors	48	23	0	29	38	44	2	16
Principals/ Vice-principals	56	21	1	22	72	17	0	11
Program Specialists	14	12	38	36	40	41	2	17
Regular Class Teachers	62	17	0	21	27	62	1	9
Resource Specialists	39	38	1	22	9	15	49	27
School Psychologists	50	30	1	19	51	41	0	7
Special Class Teachers	51	29	1	19	36	49	2	12
Special Education Administrators	28	44	2	26	60	23	0	16

*D = Distinctly Different Roles and Responsibilities
O = Overlapping Roles and Responsibilities
I = Identical Roles and Responsibilities

perceived overlap is with regular classroom teachers (62%). The roles of program specialist (41%) and school psychologist (41%) are also viewed as overlapping with the resource specialist role.

Perceived overlapping responsibilities do not seem to relate to major role conflict however. Table 4 illustrates perceived conflict. For program specialists there is "some" perceived conflict with resource specialists (28%), special education administrators (26%), school psychologists (25%), principals (22%) and special class teachers (22%). In the interviews, some program specialists also spoke of conflict between principals and themselves. In one SESR, where program specialists are hired on a management contract (at the same level with principals), a program specialist reported that some principals seem to resent the amount of authority program specialists have and tensions existed between them. In the same area, a principal who was interviewed, said program specialists were not well enough informed to be making the placement decisions they do, they should be held more accountable to the schools they serve, and they ought to act as a consultant to the building principals. For resource specialists many of the school personnel perceived "some" conflict with regular class teachers (40%), school psychologists (30%), DIS personnel (27%), program specialists (26%), and special class teachers (24%) (see Table 4). Such conflict, where minimally reported in interview data usually was related to scheduling problems, overlapping responsibilities, and personality clashes.

Effectiveness/Satisfaction

In general, both program and resource specialists are perceived as being at least somewhat effective in providing needed services. Program specialists are viewed as "quite to extremely" effective with *resource specialists* (42%), *special class teachers* (41%) and *handicapped students* (41%), possibly because these are the individuals to whom they are perceived as most *consistently* providing services. But in the interviews it was apparent the program specialists also spend time with principals, vice principals, special education directors and parents on compliance matters. In general, this assistance with compliance issues is viewed favorably. Nineteen percent of respondents said program specialists were not effective with regular classroom teachers (see Table 5).

Table 6 provides information on perceptions of school personnel regard-

Table 4

Perceived Extent of Role Conflict Between Specialists and Other Personnel
(N=257)

	Degree of Role Conflict									
	Program Specialist (%)					Resource Specialist (%)				
Personnel Roles	*N	S	M	E	DK/B	N	S	M	E	DK/B
Designated Instruction and Services Instructors	52	14	3	5	26	44	27	4	4	21
Principals/ Vice-principals	51	22	3	4	20	68	15	2	1	14
Program Specialists	42	10	3	2	42	46	26	5	2	21
Regular Class Teachers	60	14	3	2	21	42	40	5	2	11
Resource Specialists	41	28	5	3	23	51	11	3	0	35
School Psychologists	48	25	3	4	21	51	30	5	1	13
Special Class Teachers	49	22	5	3	21	56	24	3	1	16
Special Education Administrators	35	26	4	4	31	53	19	4	2	22

*N = No conflict
S = Some conflict
M = Much conflict
E = Extreme conflict

ing the specific activities of program specialists. Over half of the school personnel agree that program specialists provide leadership, and effectively coordinate the programs for which they are responsible. Program specialists are seen as providing useful input in the development of IEPs, as being effective in observing, consulting with and assisting resource specialists, DIS instructors, and special class teachers, and generally, as playing a beneficial role in providing appropriate educational services to handicapped students. Sixty-one percent of the school personnel agree that program specialists should be advocates for the educational rights of handicapped

Table 5

Perceived Effectiveness of Each Specialist
(N=257)

	Degree of Effectiveness									
	Program Specialist (%)					Resource Specialist (%)				
Personnel	*N	S	Q	E	DK/B	N	S	Q	E	DK/B
Designated Instruction and Services Instructors	9	25	20	9	37	5	23	27	15	31
Handicapped Students	5	25	25	16	29	0	18	23	47	12
Parents	7	23	26	10	34	2	15	35	35	13
Principals/ Vice-principals	9	25	25	10	31	3	19	37	21	20
Program Specialists	1	9	14	12	64	5	15	25	16	39
Regular Class Teachers	19	29	14	7	31	2	22	33	32	11
Resource Specialists	5	18	29	13	34	1	8	14	22	55
School Psychologists	7	26	23	9	35	4	20	38	18	20
Special Class Teachers	7	23	25	16	28	8	27	23	18	23

	N	S	Q	E	DK/B	No Interact.	N	S	Q	E	DK/B	No Interact.
Personal satisfaction of specific respondent in his/her role	7	24	23	16	15	15	3	24	23	31	10	9

*N = Not effective Q = Quite effective
S = Somewhat effective E = Extremely effective

students. Some criticisms were noted however. Less than a third of the school personnel agreed that program specialists provide services more efficiently than other special education personnel. In addition, program specialists are seen by 27% of the school personnel as not spending adequate time in evaluating the effectiveness of programs for handicapped students, or in providing sufficient inservice to keep the staff updated on educational

Table 6

School Personnel Views on Work of Program Specialists
(N=257)

SA means you strongly agree
A means you somewhat agree
N means neutral - you neither agree or disagree
D means you somewhac disagree
SD means you strongly disagree
DK means you don't know

(%)

		SA	A	N	D	SD	DK	Blank
1.	Program Specialists introduce innovative methods and approaches.	15	27	16	7	12	20	3
2.	Program Specialists demonstrate adequate leadership for personnel involved in Special Education Programs.	23	30	11	10	7	16	3
3.	Program Specialists provide services more efficiently than other special education personnel.	7	16	25	14	16	20	3
4.	Program Specialists provide useful input in the development of Individualized Education Programs (IEP) for students.	20	34	12	6	9	16	3
5.	Program Specialists play a beneficial role in providing appropriate educational services to handicapped students.	23	34	12	6	7	15	3
6.	Program Specialists effectively coordinate those programs for which they are responsible.	19	36	14	5	5	18	4
7.	Program Specialists currently have sufficient authority to perform their duties.	13	23	16	11	4	31	3
8.	Program Specialists emphasize services which Resource Specialists do not have time or opportunity to provide.	11	18	15	10	9	34	4
9.	Program Specialists would do a better job if they had smaller caseloads.	20	18	18	6	7	29	3
10.	Program Specialists are a valuable resource for teachers and other school personnel.	20	28	17	10	8	15	3
11.	Program Specialists are effective in observing, consulting with and assisting Resource Specialists, Designated Instruction and Services Instructors, and Special class teachers.	19	27	13	11	9	19	3
12.	Program Specialists spend adequate time in evaluating effectiveness of programs for handicapped students.	5	19	16	18	9	30	4
13.	Program Specialists are effective in planning programs, for handicapped students.	10	28	16	12	7	23	4
14.	Program Specialists have enough time to perform their duties.	6	12	13	18	11	37	4
15.	Program Specialists should all become school superintendents if they do a good job.	2	1	9	11	49	23	5
16.	Program Specialists effectively coordinate curricular resources for use with handicapped students.	5	29	19	9	9	27	3
17.	Program Specialists provide sufficient inservice to keep staff updated on educational changes.	5	27	15	15	12	24	3
18.	Program Specialists are effective in assuring that students have full educational opportunity regardless of district of residence.	10	27	15	8	4	34	3
19.	Program Specialists are given inadequate support from other school personnel to perform their duties.	2	12	16	21	11	34	4
20.	Program Specialists should be advocates for the educational rights of handicapped students.	34	27	14	4	3	14	3
21.	Program Specialists effectively provide leadership on the Educational Assessment Service (EAS) team.	20	36	10	7	4	20	4
22.	Program Specialists are needed for the successful implementation of the Master Plan.	25	25	10	5	10	21	4
23.	The work of Program Specialists results in the improved school performance of handicapped students.	17	25	16	11	8	21	3
24.	Program Specialists are effective in insuring that handicapped students are placed in the regular classroom whenever possible.	17	30	11	10	7	22	4

changes. Some personnel interviewed resented the program specialists' assumption that they are appropriate "child advocates" suggesting that all school personnel are child advocates.

A large majority of school personnel believe that resource specialists are quite to extremely effective with handicapped students (70%), parents (70%), and regular classroom teachers (65%) (see Table 5). Table 7 provides information on perceptions of school personnel regarding the specific activities of resource specialists. In addition to expertise in instruction, which results in improving the educational performance of handicapped students, resource specialists are seen by 71% of the school personnel as providing helpful consultation, resource information, and materials to students, parents and regular staff. They are perceived as providing valuable input in development of IEPs (82%) and as regularly making valid assessments of student progress (77%). Generally, resource specialists are seen as providing services which regular classroom teachers do not have the time and opportunity (86%), or skills (60%) to provide.

Criticism of resource specialists included only two items. Forty-four percent of the school personnel did not agree that resource specialists should work only with students who are placed in special education, and only 36% agreed that resource specialists provide services more efficiently than other special education personnel (see Table 7). Very little criticism of resource specialists was noted in interview data. Where criticism was reported, it typically was related to a particular specialist, not the role.

Related to perceived barriers to carrying out job requirements, 29% of school personnel reported that program specialists do not have enough time to perform their duties, 38% agreed that program specialists should have smaller caseloads, but only 15% reported that these specialists do not have enough authority. Fifty-three percent of the school personnel agreed that resource

Table 7

School Personnel Views on Work of Resource Specialist
(N-257)

SA means you strongly agree
A means you somewhat agree
N means neutral - you neither agree or disagree
D means you somewhat disagree
SD means you strongly disagree
DK means you don't know

(%)

		SA	A	N	D	SD	DK	Blank
1.	Resource Specialists are effective in improving educational performance of handicapped students.	45	38	5	2	2	8	1
2.	Resource Specialists provide services more efficiently than other specialists.	11	25	26	14	8	14	2
3.	Resource Specialists provide valuable input in the development of Individualized Education Programs (IEP) for students.	43	39	7	2	1	8	1
4.	Resource Specialists are effective in keeping teachers up to date on curriculum innovations.	16	33	18	12	8	12	1
5.	Resource Specialists provide helpful consultation, resource information and materials to parents.	30	41	8	5	2	13	1
6.	Resource Specialists have sufficient knowledge and experience in assisting students and/or parents.	32	39	9	7	3	8	2
7.	Resource Specialists provide services which regular classroom teachers do not have time or opportunity to provide.	51	35	3	2	2	6	1
8.	Resource Specialists would do a better job if they had smaller caseloads.	28	25	16	14	6	11	1
9.	Resource Specialists are a valuable resource for regular staff members.	45	35	7	5	2	6	1
10.	Resource Specialists provide useful information to handicapped students and their parents regarding instructional programs.	29	45	8	2	2	13	1
11.	Resource Specialists effectively coordinate the special education services for handicapped students.	25	40	9	7	6	11	2
12.	Resource Specialists provide services which regular classroom teachers do not know how to provide.	24	36	16	9	7	7	1
13.	Resource Specialists have enough time to perform their duties.	7	25	11	20	19	16	2
14.	Resource Specialists make useful revisions of IEPs.	17	43	13	5	3	17	3
15.	Resource Specialists make it easier for regular classroom teachers to work with their bankers.	2	5	6	1	20	56	10
16.	Resource Specialists are needed for the successful implementation of the Master Plan.	47	32	7	2	2	10	1
17.	Resource Specialists should only work with students who are placed in special education programs.	11	24	14	27	17	7	1
18.	Resource Specialists are given inadequate support from other school personnel to perform their duties.	4	16	14	30	20	16	1
19.	Resource Specialists regularly make valid assessments of student progress.	28	49	6	4	2	9	1
20.	Resource Specialists have sufficient understanding of the problems of regular classroom teachers.	20	52	7	8	3	9	1
21.	Resource Specialists do not spend enough time in direct instruction with students.	9	17	16	23	19	14	2
22.	Resource Specialists provide effective instruction and services for handicapped students.	28	42	13	2	4	10	2
23.	Resource Specialists effectively refer students who do not make progress to the IEP team.	19	33	15	5	2	25	2
24.	Resource Specialists are effective in insuring that handicapped students are placed in the regular classroom whenever possible.	27	39	12	4	3	13	2

specialists should have smaller caseloads and 39% felt that resource specialists do not have enough time to perform their duties.

Sixty-three percent of the school personnel are personally at least somewhat satisfied with program specialists services (see Table 5), and 50% agreed program specialists are needed for the successful implementation of the Master Plan (see Table 6). However, mixed reactions were felt by those who were interviewed as to how satisfied they were with the services of program specialists. Some thought the role of program specialists was unnecesary, or at least, unhelpful as it is currently conceived. Some others felt program specialists were important in assuring compliance under the law, providing resource materials, informing others of special education placement options, and equalizing the delivery of services to handicapped students. In almost all cases, it was felt that the effectiveness and credibility of a program specialist was enhanced when the person in the role spent a great deal of time at the school site, working with teachers and students. The necessity of more "hands-on" experience was stressed.

Seventy-eight percent of the school personnel are personally at least somewhat satisfied with services received from resource specialists (see Table 5), and 79% agreed resource specialists are needed for the successful implementation of the Master Plan (see Table 7). An overwhelming number of those who were interviewed were also quite satisfied with the services of resource specialists. They believe that resource specialists provide many worthwhile services such as coordinating all special education resources at the school level; acting as educator/consultant to school personnel and parents; and giving handicapped students the extra help they need in order to eventually succeed in the regular class program.

The following sections of the report detail the perceptions of program and resource specialists concerning their own role functioning. Comparisons of self-role perceptions and perceptions of other school personnel are also presented in these sections. Results for program specialists will be presented next.

Program Specialists

Questionnaire data are available from 97 program specialists and an additional 6 program specialists were interviewed during the case study phase of the study. Data reported here primarily reflect the responses of the questionnaire respondents, with perceptions of the 6 interviewees inserted where they clarify or expand information obtained through the questionnaires. Perceptions of 257 school personnel regarding the program specialist role and functioning have already been presented. These data are summarized and incorporated in the program specialist report where relevant to allow for comparisons of intended role functioning and perceived role functioning by program specialists and these other school personnel.

Demographic data concerning the questionnaire respondents and their professional role are presented first to provide the reader with an overall description of the sample. This is followed by a presentation of the data organized around the questions of the study. A summary of case study information concerning program specialists can be found in Appendix A and complete case study reports in Appendix B Unless otherwise noted, all tables are based on N = 97. Percentages for respondents who did not answer or who felt the question was not applicable are reported as Blank/NA.

Personal Demographics

None of the sample of program specialists is 25 years of age or younger. Forty percent are 26 to 35 years of age, 29% are between 36 and 45, 28% are 46 to 55 and 2% are 56 or older. Nearly three fourths of the program specialists are female (74%). These professionals are predominantly Anglo (89%) with a very small number of Black (4%), Hispanic (3%), Asian (2%) or American Indian (1%) respondents. While 36% of the respondents reported frequently encountering non-English speaking or limited-English speaking handicapped students in their work (62% reported occasional contact with LEP/NEP handicapped students), only 13% of the program specialists are bilingual. Program specialists identified 30 different languages spoken by students, but reported only 6 languages that they themselves speak in addition to English.

Role Demographics

Eighty-four percent of the individuals sampled reported that their present job title is "Program Specialist." Other titles included Coordinator of Designated Instruction and Services, (1%); School Psychologist/Program Specialist (2%); and Area Resource Teacher (9%). Over a third of the program specialists (39%) viewed the Director of Special Education (whether District, Area, or County) as their immediate supervisor, while 42% reported to a supervisor or coordinator of specialized programs (e.g., supervisor of LH, SH, CH, PH; supervisor of identification, assessment, and placement; supervisor of program specialists; program manager for staff development). Forty-four percent of the program specialists reported that they themselves have no supervisory responsibility. Of those who do supervise others, the largest percentage reported responsibility for special class teachers (29%), followed by resource specialists (26%) and instructional aides (20%). A few program specialists (3%) supervise regular class teachers. Ten percent reported other supervisory responsibilities, primarily for assessment or IEP teams (see Table 8).

Over half (56%) of the program specialists serve only 1 school district. Thirty-two percent serve between 2 and 10 districts. Six percent serve between 21 and 30 districts. Program specialists usually work in several schools, with 10 schools being the most frequently reported number. Twenty-

TABLE 8

Perceived Supervisory Responsibility of Program Specialists

(N=97)

Personnel Supervised	Percentage*
No Supervisory Responsibility	44
Regular Teachers	3
Special Class Teachers	29
Resource Specialists	26
Designated Instruction and Services Instructors	9
Instructional Aides	20
Other	10

*Percentages do not total 100% since a Program Specialist may supervise more than one type of individual.

six percent of the sample reported working in 11-20 schools, and 16% between 21 to 40 schools. Ten percent reported working in more than 40 schools, with 86 being the highest number of schools reported. In traveling to their assigned schools, program specialists reported covering an average of 134 miles per week. While 14% reported traveling at least 100 miles in a week, 42% indicated they traveled more than that, with 10% reporting between 251-500 miles per week to cover their geographic area of responsibility.

More than half of the respondents (55%) reported that their primary worksite is the district or county office while 25% work out of a special room in a school building. None of the program specialists reported working primarily in a regular classroom.

During a typical week, the average program specialist works slightly over 40 hours. Forty-eight percent reported working between 41-50 hours per week, while 4% reported from 51-65 hours of work per week.

Program specialists in the sample serve all grade levels. While most of the sample serve primary (84%), elementary (85%), and middle level (87%) programs, over half (57%) reported working in preschool programs, and 76% serve secondary programs (a program specialist might serve all grade levels, hence percentages exceed 100%).

Forty-three percent of the program specialists in the sample work on a teaching salary schedule, with 38% on an administrative salary schedule. None of those sampled earns a salary of less than $15,000 per year, with 5% in the $15,000-19,999 range, 38% in the $20,000-24,999 range, 45% in the $25,000-30,000 range and 9% reporting over $30,000 per year as their salary.

Questions of the Study

1.0 DO PERCEIVED ACTIVITIES AND FUNCTIONS OF PROGRAM SPECIALISTS MATCH INTENDED ACTIVITIES AND FUNCTIONS?

The intended role of Program Specialist was described in AB 1250 and modified in SB 1870 to include all of the following functions:

(1) Observe, consult with, and assist resource specialists, designated instruction and services instructors, and special class teachers.

(2) Plan programs, coordinate curricular resources, and evaluate effectiveness of programs for individuals with exceptional needs.

(3) Participate in each school's staff development, program development, and innovation of special methods and approaches.

(4) Provide coordination, consultation and program development primarily in one specialized area or areas of his or her expertise.

(5) Be responsible for assuring that pupils have full educational opportunity regardless of the district of residence. (EC 56368)

This description was operationalized into specific *activities* by an Ad Hoc Committee appointed by the Advisory Commission on Special Education. As previously discussed, questionnaire items were developed based on Education Code requirements and activities specified in this Ad Hoc Committee Report (see Appendix C). For purposes of the present study, the data have been collected and organized to analyze intended vs. perceived actual role performance both in terms of the *functions* described in law and specific *activities* relating to the entire process of education of individuals with exceptional needs. A comparison of intended and actual role performance of program specialists will first be presented in terms of the specific responsibilities of program specialists in referral, assessment, instructional planning and placement, instruction and review activities.

Role functioning. Nearly half (44%) of the program specialists indicated they have major responsibility for the *overall* management of a student's case from referral through placement and review of progress. Sixteen percent reported having full responsibility and only 3% said they have no responsibility for the management of individual "cases." As described through interview data, "overall management" might include a major responsibility for overseeing an assessment team for multiple schools, receiving referrals from schools for initial placement or reviews of placement, holding pre-assessment meetings, coordinating all responsible parties (parents, school personnel), reading documents on students, and generally pulling a case together. When assessment is completed, a program specialist might chair the IEP meeting and take responsibility for helping the group come to a consensus on a placement decision. Student review meetings might be attended by a program specialist. Nearly two thirds (63%) of other school personnel perceived program specialists to have at least some case management responsibility but only 21% perceived this as a major responsibility for the specialists.

Table 9 illustrates the degree of responsibility program specialists reported having in specific special education areas. Over half (55%) of the program specialists reported major responsibility for coordination, consultation and/or program development in the learning handicapped area, with considerably fewer having major responsibility for communicatively handicapped (19%), physically handicapped (10%), and severely handicapped (18%) programs. About half of the program specialists have at least some responsibility in career-vocational development (53%) and preschool handicapped (44%) areas.

TABLE 9

Perceived Degree of Program Specialists' Responsibility for Coordination, Consultation, and/or Program Development in Special Education Areas

(N=97)

Area	Degree of Responsibility (%)			
	Major	Some	None	Blank/NA
Career Vocational Development	6	53	31	10
Communicatively Handicapped	19	34	32	15
Learning Handicapped	55	27	12	6
Physically Handicapped	10	32	41	17
Preschool Handicapped	14	44	29	12
Severely Handicapped	18	34	34	14

When asked how they distribute their work time over the course of a school year, program specialists reported most of their time is spent in instructional planning and placement, and student review. Thirty-one percent reported spending no time in instruction; 41% spend no time in research. Many indicated less than 5% of their time is spent on program development (56%), assessment (46%), or program review (46%). Since involvement in these areas

TABLE 10

Perceived Distribution of Program Specialists' Time Between Major Areas of Work (Over a School Year) (N=97)

	Percentage of Time Spent in Activities						Time of Year When Activities are Heaviest (%)			
Area of Work	0	1-10	11-20	21-30	31+	B/NA	Fall	Winter	Spring	Summer
Referral	5	61	12	7	1	13	64	17	32	1
Assessment	10	53	13	5	3	16	35	19	40	4
Instructional Planning	4	50	23	7	2	14	43	31	30	6
Placement	1	41	27	13	7	13	57	26	34	8
Instruction	31	43	4	2	0	21	1	16	13	4
Student Review	1	33	24	17	15	12	21	28	68	12
Program Review	4	65	14	6	0	13	1	23	41	9
Staff Development	1	65	10	9	7	10	51	32	38	9
Research	41	39	0	0	0	20	3	6	10	16
Program Development	6	63	10	4	1	16				

of work might vary throughout the year, program specialists were asked when activities in each area were heaviest. Referral, placement and staff development activities are perceived to be heaviest during the fall. Activities are fairly evenly spread through the winter, but student and program review as well as assessment activities are more demanding in the spring (see Table 10).

Perceptions of the frequency of specific professional activities in each of these areas of work are found in Table 11. Perceived role functioning across the activities is operationally defined as the frequency with which the majority (over 50%) of program specialists reported they engage in these activities. A majority of the program specialists (57%) are involved 1-2 days

TABLE 11

Perceived Distribution of Work Time Across Specific Activities (Over a School Year)
(N=97)

Specific Activities by Area	Amount of Time (%) *Never	Rarely	Occasionally	Frequently	Daily	B/NA
Referral						
Assist school professionals in implementing referral procedures	1	13	30	38	12	4
Monitor overall referral process	1	16	23	31	26	4
Coodinate referrals of community agencies	14	33	37	14	1	1
Assessment						
Assist in coordination of assessments conducted by other professionals	3	13	27	32	22	3
Assist other personnel in the selection and utilization of appropriate assessment instruments and techniques	9	44	37	6	3	3
Instructional Planning						
Participate in development of Individualized Education Programs (IEP)	1	1	6	61	29	2
Assist IEP Team in using assessment data for developing and/or modifying IEP's	1	0	14	59	23	3
Assist teachers in selecting materials and activities to meet goals and objectives of IEP's	2	14	39	35	7	2
Consult with parents regarding the educational planning process	0	9	27	50	13	1
Consult with other personnel in modifying regular education programs for students who are ineligible for special education services	6	23	43	20	4	4
Placement						
Assist IEP (SAT/EAS) teams and other personnel in preparation for and follow-up of placement	0	1	8	49	39	3
Participate in the placement of students in non-public and state school programs and monitor progress of these students as requested	23	43	24	6	2	2
Participate in placement and review meetings in an advocacy role for students	19	20	17	35	6	4
Assist in assuring appropriate placement for each student	0	4	7	59	28	2

*Never = never engage in this activity
Rarely = 1-5 days per year
Occasionally = 1-2 days per month
Frequently = 1-2 days per week
Daily = more or less daily

▭ = categories of frequency in which the largest majority (over 50%) of program specialists reported engaging in the activity

TABLE 11 (continued)
Perceived Distribution of Work Time Across Specific Activities (Over a School Year)

Specific Activities by Area	Never	Rarely	Occasionally	Frequently	Daily	B/NA
Instruction						
Provide ongoing consultation with teachers regarding new and innovative methods, approaches, and materials	2	7	29	38	22	2
Monitor to see that IEPs are appropriate and fully implemented	1	8	30	38	19	4
Coordinate use of curricular resources required for successful IEP implementation	6	9	49	29	3	4
Work with students one at a time	20	40	27	11	1	1
Work with small groups of students	32	31	26	9	2	2
Coordinate instructional program between the home and school	16	39	34	10	1	1
Student Review						
Assist teachers and others in documenting student progress	1	13	39	40	4	2
Assist teachers and other professionals in preparing for annual or requested reviews	0	9	31	53	2	5
Assist in assessing program effectiveness for students	5	10	38	40	2	4
Program Review						
Observe resource specialists, designated instruction and services instructors, and special class teachers	2	7	23	39	25	4
Coordinate informal and formal program reviews at school site and/or SESR level	5	32	22	30	7	4
Consult with teachers, administrators, and parents regarding the operational aspects of a program	0	6	30	45	13	5
Assist in identifying need for program change	3	8	36	51	2	2
Staff Development						
Design staff development activities based on needs assessment	7	20	37	31	1	4
Provide inservice on special topics as requested	0	17	52	30	2	2
Coordinate implementation of staff development activities	13	21	33	29	3	1
Program Development						
Assist in development of the local comprehensive plan	25	36	30	6	2	1
Work with other school personnel in development and implementation of innovative programs	7	35	40	14	1	2
Assist in upgrading existing programs	4	17	33	33	11	2
Assist in development of handbooks and materials	10	32	36	18	2	2
Research						
Participate in research in SESR	29	46	17	0	0	8
Write research reports	53	39	4	0	0	4
Routine Activities						
Complete routine forms	1	8	11	33	44	2
Write reports	3	13	32	32	18	2
Travel for job related activities	1	23	14	16	44	2
Engage in telephone communication	1	0	1	6	90	2

a week in monitoring the overall referral process. Sixty-eight percent reported spending between 1-2 days a month and 1-2 days a week assisting school professionals in implementing referral procedures. During assessment, 59% reported assisting between 1-2 days a month and 1-2 days a week in coordination of assessments conducted by other professionals, while the majority (81%) reported rarely or only occasionally assisting in the selection and utilization of appropriate assessment instruments and techniques.

Under instructional planning and placement, ninety percent of program specialists reported they participate in developing IEPs 1-2 days per week. Eighty-seven percent spend this much time in assuring appropriate placements are made for each student. Two thirds (66%) rarely or occasionally consult with other personnel in modifying regular education programs for students who are ineligible for special education services.

Under instruction, 78% reported being involved between 1-2 days a month and 1-2 days a week coordinating curricular resources required for successful IEP implementation. The majority of specialists rarely to occasionally work with students one at a time (67%), and never or rarely work with small groups of students (63%). Over three fourths of the program specialists are involved at least 1-2 days a month in student review activities such as assisting in documenting student progress (83%). Involvement in program review activities differs for many program specialialists; for example--roughly equal numbers reported rarely (32%) and frequently (30%) coordinating informal and formal program reviews at the school site and/or SESR level.

A majority of program specialists indicated that they spend at least 1-2 days per month providing inservice on special topics (84%) and coordinating the implementation of staff development activities (65%). However, another 34% rarely or never coordinate staff development activities.

TABLE 12

Perceived Distribution of Work Time Across Functions of the Role (Over a School Year)
(N=97)

Specific Activities by Function	Amount of Time (%) *Never	Rarely	Occasionally	Frequently	Daily	B/NA
Observe						
Observe resource specialists, designated instruction and services instructors, and special class teachers	2	7	23	39	25	4
Consult						
Provide ongoing consultation with teachers regarding new and innovative methods, approaches and materials	2	7	29	38	22	2
Consult with other personnel in modifying regular education programs for students who are ineligible for special education services	6	23	43	20	4	4
Consult with teachers, administrators, and parents regarding the operational aspects of a program	0	6	30	45	13	1
Consult with parents regarding the educational planning process	0	9	27	50	13	5
Assist						
Assist school professionals in implementing referral procedures	1	13	30	38	12	4
Assist IEP (SAT/EAS) teams and other personnel in preparation for and follow-up of placement	0	1	8	49	39	3
Assist teachers and other professionals in documenting student progress	1	13	39	40	4	2
Assist with coordination of assessments conducted by other professionals	3	13	27	32	22	3
Assist IEP Team in using assessment data for developing and/or modifying IEPs	1	0	14	59	23	3
Assist teachers and other professionals in preparing for annual or requested reviews	0	9	31	53	2	5
Assist in upgrading existing programs	4	17	33	33	11	2
Assist in assuring an appropriate placement for each student	0	4	7	59	28	2
Assist other personnel in the selection and utilization of appropriate assessment instruments and techniques	0	9	44	37	6	3
Assist teachers in selecting materials and activities to meet goals and objectives in IEP	2	14	39	35	7	2
Assist in assessing program effectiveness for students	5	10	38	40	2	4
Assist in identifying need for program change	3	8	36	51	2	2

*Never = never engage in this activity
Rarely = 1-5 days per year
Occasionally = 1-2 days per month
Frequently = 1-2 days per week
Daily = more or less daily

▭ = categories of frequency in which the largest majority (over 50%) of program specialists reported engaging in the activity

TABLE 12 (continued)
Perceived Distribution of Work Time Across Functions of the Role (Over a School Year)

Specific Activities by Function	*Never	Rarely	Occasionally	Frequently	Daily	B/NA
Plan						
Design staff development activities based on needs assessment	7	20	37	31	1	4
Work with school personnel in development and implementation of innovative programs	7	35	40	14	1	2
Assist in development of the local comprehensive plan	25	36	30	6	2	1
Assist in development of handbooks and materials	10	32	36	18	2	2
Coordinate						
Coordinate formal and informal program reviews at school site and/or SESR level	5	32	22	30	7	4
Coordinate use of curricular resources required for successful IEP implementation	6	9	49	29	3	4
Coordinate implementation of staff development activities	13	21	33	29	3	1
Coordinate the referrals of community agencies	14	33	37	14	0	1
Coordinate instructional program between home and school	16	39	34	10	0	1
Montitor						
Monitor to see that IEPs are appropriate and fully implemented	1	8	30	38	19	4
Participate in the placement of students in non-public and state school programs and monitor progress of these students as requested	23	43	24	6	2	2
Monitor overall referral process	1	16	23	31	26	4

In terms of program development, the majority (75%) rarely or only occasionally work with other school personnel in the development and implementation of innovative programs. However, an equal number of specialists (77%) see themselves as spending at least 1-2 days per month assisting in upgrading existing programs. The majority (75%) of specialists never or rarely participate in research in the SESR.

In addition to activities in the specific areas of delivery of services, routine activities such as completing forms, writing reports, travel, and phone communications occur very frequently as part of the majority of program specialists' work.

If the specific activities of program specialists are grouped according to the functions described in law (observe, consult, assist, plan, coordinate, monitor/evaluate) rather than by area of work, it can be seen that the majority of program specialists see themselves spending at least 1-2 days a month observing, consulting, assisting, and monitoring; while the majority see themselves as only rarely or occasionally involved in planning activities or engaged in some coordinative functions (see Table 12). From interview data a similar view emerges. While program specialists perceived themselves as engaging in all functions, they talked more of playing an assisting and/or consulting role than a coordinative one. Observing usually occurs as part of the specialist's supervisory responsibility and is done for purposes of program review or curriculum development. Monitoring generally involves checking for compliance in IEP implementation. Coordination of assessment/IEP teams seems to be the most frequent example of a coordinating role.

Summary of questionnaire and case study data. Program specialists perceive themselves as being involved in all aspects of the delivery of services to individuals with exceptional needs, with instructional planning and placement, and student review activities accounting for the largest amount of time over the school year. Perceptions of other school personnel fairly well validate the program specialist's own perceptions in that placement and student review are the areas where the specialists are seen as having the greatest responsibility. Case study data corroborated the findings from questionnaire respondents.

Related to the functions of the intended program specialist role, the majority of program specialists perceive themselves to at least occasionally play an observing, consulting, assisting, or monitoring role and less frequently to engage in planning or coordinative activities. Very few program specialists reported never performing the specific functions required by SB 1870. Other school personnel corroborate the program specialists self perceptions and a majority agree that program specialists are effective in observing, consulting with and assisting resource specialists, DIS instructors and special class teachers, as well as in coordinating those programs for which they are responsible.

While it appears that the functions and specific activities engaged in by program specialists are generally congruent with the intended role, there are several areas in which perceptions are discrepant. Staff development and program development are two of the general areas in which the specialists reported spending the least amount of time and yet these are clearly delineated as important functions for the program specalist role. Many other school personnel (42%) think that program specialists do introduce innovative methods and approaches, but 27% do not think program specialists provide sufficient inservice to keep staff updated on educational changes. From case study data, program specialists speak of implementing rather than initiating programs, but they say that they engage in considerable staff development activities. It seems that many specialists are involved in improving existing programs but not in program or curriculum development or innovation. Program specialists do provide or coordinate staff development activities, but apparently not enough to meet the needs perceived by other school personnel.

2.0 ARE THE INTENDED RECIPIENTS BEING SERVED?

In the course of their work, program specialists interact with a variety of individuals. Table 13 lists the perceived frequency of these professional contacts. A majority of program specialists reported daily contact with handicapped students (53%), other program specialists (68%) and special class teachers (67%), with about half reporting daily contact with resource specialists (49%) and special education administrators (42%). About half reported contact 1-2 times per week with DIS instructors (56%), principals (42%) and school psychologists (52%), with 61% reporting frequent contact with parents. About half have contact 1-2 times a month with community agencies and regular class teachers. The nature of this contact varies, however. For example, while 53% reported daily contact with handicapped students, very few reported working with students daily either one at a time or in small groups (2%).

Table 14 illustrates the number of individuals program specialists have contact with during a week. The most frequently reported number of handicapped students seen was 5 (28%), while the number ranged from none (2%) to 200 (1%). Program specialists interact with an average of 31 handicapped students, 6 resource specialists, 7 parents, 6 DIS instructors, 5 principals, 4 regular teachers, 6 school psychologists, and 8 special class teachers during a typical week. They have contact with quite a few special class teachers - 25% reported seeing between 11-20 per week.

TABLE 13

Perceived Frequency of Program Specialists' Professional Contact with Other Individuals

(N=97)

Individuals	Frequency of Contact (%) *Never	Rarely	Occasion-ally	Frequently	Daily	B/NA
Coordinators of Non-Special Education Programs	6	38	37	11	3	4
Community Agencies	2	13	56	26	2	1
Designated Instruction and Services Instructors	0	3	3	56	35	3
Handicapped Students	1	0	9	36	53	1
Parents	0	2	16	61	21	1
Principals/Vice-Principals	0	2	20	42	35	1
Other Program Specialists	0	1	4	26	68	1
Regular Class Teachers	1	14	44	30	9	1
Resource Specialists	1	6	17	26	49	2
School Psychologists	0	1	11	52	34	2
Special Class Teachers	0	0	7	24	67	2
Special Education Administrators	1	0	6	49	42	2

*Never	means no contact whatsoever
Rarely	means contact 1-5 times per year
Occasionally	means contact 1-2 times per month
Frequently	means contact 1-2 times per week
Daily	means contact more or less daily

TABLE 14

Perceived Number of People Program Specialists Have Contact With Per Week(%)
(N=97)

Role of Person	Number of People						
	0	1-5	6-10	11-20	21-30	31+	B/NA
Designated Instruction and Services Instructors	2	59	25	6	3	0	5
Handicapped Students	2	28	11	14	8	35	6
Parents	1	42	29	11	1	0	5
Principals/Vice-Principals	0	65	26	4	0	0	5
Other Program Specialists	1	44	37	11	0	3	5
Regular Classroom Teachers	7	68	11	7	1	0	6
Resource Specialists	5	52	30	7	1	0	5
School Psychologists	1	72	15	2	0	3	6
Special Class Teachers	1	41	28	25	0	1	5

Summary. The role of program specialist as described in SB 1870 clearly specifies resource specialists, DIS instructors, and special class teachers as primary recipients of their services. However, program specialists reported that in addition to providing assistance to these personnel they spend a considerable amount of time interacting with administrators, parents and handicapped students. Other school personnel, in both case study interviews and questionnaires, reported limited contact with program specialists, with over half of the questionnaire respondents indicating they never or very rarely see the program specialists. Many school personnel interviewed felt the program specialists were "spread too thin" and thus had only limited time for interaction with many school professionals. Contact was seen to occur most frequently with personnel who had "overlapping responsibilities" or employees they were required to supervise. Lack of contact or accessability led to negative feelings towards program specialists among some school personnel, but school personnel, in general, believe that program specialists are providing needed services to resource specialists, DIS instructors and special class teachers as well as to handicapped students, parents, and administrators.

3.0 HOW WELL PREPARED ARE PROGRAM SPECIALISTS TO PERFORM THE INTENDED ROLE?

Nearly half of the program specialists did not answer the questions concerning credentials and experience. Since there could be a variety of reasons for this, it was determined to report the findings in terms of percentages based on number of responses in a category divided by the total sample rather than only on those responding. However, these findings must be interpreted accordingly.

The program specialists responding to the question reported holding a variety of regular and special education credentials. Thirty-seven percent have elementary teaching credentials; 13% secondary credentials, and 4% have credentials to teach in community colleges. A third of the sample (33%) have some type of administrative or supervision credentials. Ten percent reported holding a pupil personnel services (or school psychologist) credential and another 2%, counseling credentials. Four percent have reading specialist credentials; 8% some type of speech and hearing credential. Six percent reported having a general special education credential, 37% have credentials for teaching learning handicapped, 5% for communicatively handicapped, 14% for severely handicapped, and 2% for physically handicapped. None of the program specialists reported holding clinical services, health services, or early childhood specialist credentials.

Thirty-nine percent of the sample reported holding a master's degree;

18% in special education. Other master's degree areas reported include counseling and/or school psychology (3%), administration (4%), and speech pathology (4%). Five percent of the program specialists reported having a doctoral degree, with 2% in special education, 2% in administration, and 1% in counseling and/or school psychology.

In terms of experience, two thirds of the respondents (66%) have held their current position for one to three years; 20% for four years; 9% for 5 years; and 4% for six or more years. Prior to becoming program specialists, the respondents held various positions as professional educators. Forty-nine percent were special education teachers, 21% taught in regular education programs. Fifteen percent reported experience as resource specialists, 8% as speech therapists, 7% as school psychologists, 2% as counselors, and 2% as reading specialists. Five percent have experience as a coordinator of programs, 3% have been elementary administrators and 2% reported experience as a director of special education. Three percent of the sample have taught at the college level.

When asked about their familiarity with special education laws, 89% of the program specialists reported that they are very familiar with PL 94-142; another 9% reported being somewhat familiar and 2% as not familiar with this federal law. The same percentages reported familiarity or lack thereof with the old California Master Plan for Special Education (AB 1250). However, only three-fourths of the specialists (73%) were very familiar with SB 1870, with 24% reporting some familiarity with the new law, and 2% had no familiarity with the current Master Plan.

When asked what was the best preparation for their current job, 67% of the program specialists identified inservice/workshops; 65% felt informal professional activities such as discussions with other professionals were important; 59% felt formal coursework was useful, 38% identified journals and 34% conventions as good preparation. Fifty percent identified on the job training, particularly classroom teaching experience as a critical aspect of their preparation to be program specialists. (Respondents could answer in more than one category, hence percentages exceed 100%.)

Table 15 lists specific perceived skills relevant for the functioning of program specialists. A much higher percentage of respondents indicated they had job-related experience than formal training in all areas except in using tests for assessing educational needs. However, respondents, in general, reported they had received either formal training or job-related experience which enabled them to feel very skilled in these areas. The areas in which program specialists felt their training or experience was somewhat inadequate included using tests to assess social needs, developing tests, and using observation techniques for assessing teacher effectiveness.

Feeling that current preparation is adequate, nearly three fourths (72%) of the program specialists think there should not be a special credential for program specialists. Those who felt there should be a program specialist credential primarily recommended regular and special education teaching experience, counseling/consulting skills and administrative/supervisory skills as prerequisite training and experience. In addition, the ability to get along with people was cited as important.

Summary. According to SB 1870, a program specialist "is a specialist who holds a valid special education credential, clinical services credential, health services credential, or a school psychologist authorization and has advanced training and related experience in the education of individuals with exceptional needs and a specialized indepth knowledge in one or more areas of major handicapping conditions, in preschool handicapped, or career

TABLE 15

Perceived Training, Experience and Skill of Program Specialists in Specific Special Education Activities (N=97)

Area	Formal Training (%)		Job-related Experience (%)		Degree of Skill (%)		
	Yes	No	Yes	No	Not Skilled	Somewhat Skilled	Very Skilled
Screening students for special education	74	18	96	4	0	16	81
Processing referrals of students of special education	53	36	92	2	1	12	83
Using tests for assessing the educational needs of special education students	91	5	94	6	0	26	71
Using tests to assess social needs of special education students	52	42	77	16	11	59	25
Using observations to assess student needs	81	13	96	4	0	16	80
Developing tests for assessing needs	54	39	81	14	13	57	27
Developing Individual Education Programs (IEP) for students	62	30	96	4	0	5	91
Using the IEP for Instructional purposes	55	38	91	3	1	17	77
Instructing special education students in academic areas	85	11	94	2	2	20	74
Socially integrating special education students in the classroom	54	40	88	7	6	39	50
Coordinating resources and services for students	47	41	94	2	1	35	59
Working with other personnel to provide services to special education students	51	38	95	5	0	27	70
Communicating with parents	65	29	96	4	1	11	84
Using observation techniques for assessing teacher effectiveness	46	44	85	10	6	45	43

vocational development." (EC 56368) Given these requirements, some program specialists do not seem to possess the prerequisite credentials. Less than two thirds of the specialists reported holding some type of special education credential. None of the sample reported holding clinical services, health services or early childhood specialist credentials and few reported having a pupil personnel services (or school psychologist) credential.

About half of the program specialists reported holding regular education credentials and a third have administrative credentials. About half of the specialists have advanced degrees. The program specialists sampled do have a wide range of previous experiences in education, much of it in special education and it may be that this experience has assisted them in generating a specialized indepth knowledge of one or more areas of major handicapping conditions. The noticeable lack in preparation and experience is in the preschool and career vocational development areas; since none of them reported credentials, specialized advanced training, or experience in these areas (and half of them have at least some responsibility in these areas). In addition, while over half of the specialists reported major responsibility for learning handicapped programs, only a third reported having credentials in this area. These findings correspond to the information available on training and experience of the program specialists interviewed as part of the case studies.

Program specialists felt that informal professional activities such as discussions with colleagues and inservice were the best preparation for the job; it is likely that these activities augment information and skills provided in formal training, since overall, program specialists believe they are skilled in providing the services that are their responsibility.

4.0 HOW IS THE PROGRAM SPECIALIST ROLE PERCEIVED TO RELATE TO OTHER PROFESSIONAL ROLES IN THE EDUCATIONAL SYSTEM?

Program specialists view their role and responsibilities as distinctly different from most other personnel. School psychologists (40%) and special education administrators (67%) are the individuals with whom there is the most perceived overlap. These are also the personnel with whom program specialists perceive they have role conflict (see Table 16).

TABLE 16

Perceived Role Relationships of Program Specialists with Other Personnel (N=97)

	Role Responsibilities (%)				Degree of Conflict (%)			
Program Specialists with:	Different	Overlap	Identical	B/Don't Know	*N	S	M	EX
D.I.S. Instructors	87	7	1	1	77	12	0	1
Principals/Vice-principals	65	33	1	0	52	36	6	0
Resource Specialist	67	30	1	2	68	24	1	0
Regular Class Teachers	92	6	0	0	72	17	1	1
Other Program Specialists	21	55	20	1	60	32	2	0
School Psychologists	58	40	0	0	42	45	4	0
Special Class Teachers	80	19	1	0	67	25	0	0
Special Education Administrators	28	67	2	1	30	46	14	1

*N = No conflict
S = Some conflict
M = Much conflict
Ex = Extreme conflict

The views of other school personnel differ slightly from the perceptions of program specialists. School personnel agree that there is role overlap with special education administrators and to some extent with school psychologists. However, in addition, the school personnel perceive overlap between the responsibilities of resource specialists and program specialists. The role of program specialist is seen by the school personnel to conflict the most with the roles of psychologists, special education administrators and resource specialists. Very likely this overlap and conflict is related to the perceived similarities in the functions these various individuals fulfill at various times. For example, school psychologists in many districts used to run meetings, coordinate assessments and other functions now assumed by program specialists. Often special education administrators are viewed as limiting the freedom of program specialists to carry out activities because the specialists lack authority. Conflict often arises with resource specialists when program specialists do not have the time to provide ongoing consultation regarding recommended instructional procedures.

5.0 WHAT SPECIFIC ORGANIZATIONAL, PERSONAL, OR ROLE DEMOGRAPHIC VARIABLES INFLUENCE PERCEIVED ROLE FUNCTIONING?

Several personal, organizational, and/or role demographic variables were hypothesized to be related to overall functioning of program specialists. Number of years of experience, supervisory responsibility, grade level served, type of salary schedule, and number of years the SESR has been functioning under the Master Plan are variables which relate to some aspects of role functioning. Data are summarized in each of these areas.

Number of years experience in the role. The amount of responsibility that program specialists have for the overall management of a student's case seems to increase with the number of years in the role. Thirty-eight percent of specialists with 1 year or less of experience indicated that they have major to full responsibility in comparison to 68% with 3 years experience and 78% with 5 years of experience. No real differences are noted between program specialists with more or less experience in terms of how they spend their time in the major areas of activity in their work, nor in terms of the type of supervisory responsibility they have (type of personnel supervised), or degree of responsibility for coordination, consultation and/or program development in specific special education areas such as LH, SH, etc. In general, years of experience did not influence perceptions of role responsibilities or conflict with roles of other personnel. There does not seem to be a burn out; program specialists remain satisfied with their work after several years in the role and in fact see themselves as increasingly effective, the more time spent in the role.

Supervisory responsibility. In comparing those program specialists who have no supervisory responsibility with those who do supervise some personnel several differences emerge. Among those who do supervise others, more of them are serving elementary grade levels than either preschool or secondary level programs. A larger percentage of those who supervise special class teachers, resource specialists, DIS instructors, and instructional aides are on a teaching rather than administrative salary schedule.

Both program specialists with and without supervisory responsibility perceived overlap and conflict with the roles of other personnel, particularly special education administrators. However, more program specialists who do not supervise others perceived conflict with special education administrators.

In general, having supervisory responsibility did not make program specialists feel they were any more effective with the individuals they serve.

Grade level served. None of the program specialists who serve elementary level programs reported having full responsibility for a students' case from referral through placement and review of progress. At all other grade levels at least 10% indicated they have full responsibility for a student's case.

Program specialists serving secondary programs have no more responsibility for career vocational development than those who reported serving other levels of the educational system. Likewise, those serving preschool programs have no more responsibility for preschool programs than others.

Program specialists serving elementary and secondary level programs do not report differences in the major areas of activity in their work. There seems to be slightly less conflict with special education administrators at the secondary level, otherwise there are no differences between program specialists serving different grade levels in their perceptions of overlap or conflict with the roles of other personnel.

Specialists serving different grade levels do not differ in the satisfaction expressed with their work or in their perceived effectiveness in providing services to others.

There are no differences in the types of credentials reported to be held by program specialists serving any grade level

Type of salary schedule. Many issues related to perceived functioning of program specialists have been hypothesized to be related to differences in designation of the specialists as part of the instructional staff or as part of the administration. One way of pursuing this issue is through specification of whether the specialist is hired under a teaching or administrative salary schedule. In fact, this seemed to be the variable which produced greatest differences among program specialists in their perceived functioning.

One difference between specialists employed under different salary schedules which may or may not reflect differences in functioning is in actual salary. In general, the difference between the teaching and administrative salaries is about $5000 per year.

As reported in a previous section, 43% of the program specialists are functioning under a teaching salary schedule, while 38% are employed under an administrative salary schedule. Nearly half (44%) of the overall sample reported having no supervisory responsibility. However, of those who have no supervisory responsibility, 28% are working under an administrative salary schedule.

A larger percentage of program specialists on administrative salary schedules (65%) felt they had major to full responsibility for the overall management of a student's case than program specialists on teaching salaries (51%). Those specialists on teaching salaries, however, felt more responsibility in communicatively handicapped, learning handicapped, physically handicapped and severely handicapped programs than specialists on administrative salaries. There was no difference between the two groups in career vocational development or preschool areas. In terms of major activities in their work, a higher percentage of program specialists on administrative than on teaching salaries reported spending over 10% of their time on referral (36% to 21%), assessment (33% to 22%), instructional planning (41% to 28%), and program review (24% to 15%). No appreciable differences were reported for the two groups for placement, instruction, student review, or program development/innovation activities. A larger percentage of specialists on teaching salaries spend over 10% of their time on staff development (41% to 19%).

When asked about role relationships with other professionals, more specialists on administrative than teaching salaries reported overlap in responsibilities with principals and vice principals (43% to 27%), but the groups both perceived conflict with these administrators. A larger percentage of specialists on teaching than administrative salaries reported overlap with resource specialists (40% to 24%), but there is no real difference between the groups in the amount of conflict perceived.

A larger percentage of specialists on teaching salaries perceived overlap (50% to 32%) as well as conflict (66% to 37%) with school psychologists and also perceived overlap with special class teachers (30% to 16%). Slightly more program specialists on administrative salaries perceived overlap with special education administrators (79% to 69%) but more on teaching salaries reported conflict with special education administrators (71% to 61%).

Whether a specialist functioned under a teaching or administrative salary schedule did not seem to make a difference in terms of job satisfaction; as discussed previously, program specialists are, in general, satisfied with their work. Related to their perceived effectiveness, again, specialists on teaching or administrative salaries see themselves as roughly equally effective. The only perceived differences in effectiveness related to regular class teachers and parents. A larger percentage of program specialists on administrative as compared to those on teaching salaries perceived themselves as quite to extremely effective with regular class teachers (38% to 24%) and parents (87% to 77%).

Neither prior experience nor credentials appeared to relate to whether a specialist was on a teaching or administrative salary schedule. That is, relatively equal percentages of program specialists in both teaching and administrative categories had teaching and administrative credentials and experience.

Number of years functioning under Master Plan. Data pertaining to this variable are available only from the case study interviews. Definition of major responsibilities varies depending on how a SESR operationalizes the program specialist role. The number of years of experience any particular SESR has had under the Master Plan seems to influence how program specialists function in that particular SESR. In the initial year(s) a SESR is functioning under Master Plan, the program specialists seem to be assigned primarily a compliance function. In these SESR's program specialists were perceived by others as representatives of the law; they provided information about changes in forms and procedures. In those areas where the Master Plan is still relatively new, program specialists are not always viewed positively. Conversely, the SESR's which have had several years of experience with the Master Plan seemed to assign program specialists either geographically or by area of specialization and these specialists fulfill a larger variety of functions including troubleshooting for the overall special education program. In those areas where the Master Plan has been in operation for several years the program specialists were perceived more favorably by others.

6.0 HOW EFFECTIVE IS THE PERCEIVED FUNCTIONING OF PROGRAM SPECIALISTS?

In spite of problems encountered in carrying out the role requirements, program specialists view themselves as effective in providing services to various personnel. They reported being most effective with special class teachers, resource specialists, handicapped students, and parents. (See Table 17).

School personnel also view program specialists as being most effective with resource specialists, special class teachers and handicapped students. Perceptions of specialists themselves and school personnel agree that program specialists are least effective with regular class teachers.

TABLE 17

Perceived Effectiveness of Program Specialists in Providing Services
(N=97)

Provide Services For:	Degree of Effectiveness (%)				
	Not	Somewhat	Quite	Extremely	B/NA
D.I.S. Instructors	7	34	41	10	7
Handicapped Students	0	11	52	33	4
Parents	0	19	54	27	1
Principals/Vice-principals	1	28	58	10	3
Other Program Specialists	2	14	59	22	3
Regular Class Teachers	12	52	24	9	3
Resource Specialists	5	13	42	31	8
School Psychologists	4	29	51	14	2
Special Class Teachers	0	8	52	36	4

Data regarding perceptions of school personnel on the effectiveness of program specialists in specific activities and functions have been presented in the section on school personnel. In general, while it can be said that program specialists are perceived as providing effective services, some criticisms are also noted by individuals interviewed. However, in almost all cases it was felt that effectiveness of program specialists was enhanced when the person in the role spent a great deal of time at the school site working with teachers and students.

As previously reported, nearly two-thirds of the school personnel are personally satisfied with program specialists services and half agree program specialists are needed for the successful implementation of the Master Plan.

7.0 WHAT PROBLEMS ARE PERCEIVED AS IMPEDING EFFECTIVE ROLE FUNCTIONING OF PROGRAM SPECIALISTS?

A majority (54%) of the program specialists are at least quite satisfied with their work; only 2% indicated total dissatisfaction, with 24% reporting themselves as somewhat satisfied. Twenty percent are extremely satisfied.

Program specialists did report problems in role functioning, however. The most significant barriers to carrying out job requirements are perceived to be lack of time, too large a caseload, and lack of authority (see Table 18). Thirteen percent reported other problems including lack of adequate funding, lack of direction from federal and state levels, paperwork - lack of clerical help, distance between sites, and districts'

TABLE 18

Perceived Problems Preventing Program Specialists
From Carrying Out Job Requirements
(N=97)

Problem	Degree of Problem (%)				
	Not	Slight	Moderate	Extreme	B/NA
Administrative problems at SESR level	28	37	24	5	6
Administrative problems at local level	16	32	34	11	7
Lack of authority to carry out duties	23	20	35	21	2
Lack of time	6	16	37	41	0
Lack of support from others	30	44	22	3	1
Caseload too large	23	18	47	9	3
Lack of training in specific areas	42	45	9	3	3
Other	1	1	2	9	87

view of them as outsiders. Program specialists who were interviewed also felt they were spread too thin by constraints of time and distance to be covered. Other specialists spoke of being "outsiders" with the responsibility to ensure compliance, but without the needed authority to require that the laws be followed. As previously reported, 29% of school personnel agree that program specialists do not have enough time to perform their duties, 38% agree that program specialists should have smaller caseloads, but only 15% think that the specialists do not have enough authority.

8.0 WHAT CHANGES IN THE PROGRAM SPECIALIST ROLE AND RESPONSIBILITIES ARE NEEDED TO INCREASE EFFECTIVENESS?

In terms of their perceptions of how the role should ideally be carried out, most program specialists agreed that they are spending the appropriate amount of time with the individuals they serve (see Table 19). One notable exception is that half of the program specialists believe they should spend more time with regular classroom teachers. This opinion was never voiced during the case study interviews, however.

While most program specialists viewed time spent on various activities in their work areas as appropriate, over half of them feel they should be spending more time in ongoing consultation with teachers (56%), in modifying the regular education program for ineligible students (53%), and working with other personnel to develop and implement innovative programs (71%). The major area where they would reduce time spent is in routine activities. While most program specialists spend very little time participating in research activities, over half (51%) indicated they feel they should spend more time involved in research (see Table 20). However, others were relieved that this component of the role of program specialist was removed by SB 1870.

TABLE 19

Desired Frequency of Contact of Program Specialists With Other Individuals (N=97)

	Degree of Contact (%)			
	Less	More	Same	B/NA
Coordinators of Non-special Education Programs	0	21	72	7
Community Agencies	0	34	64	2
DIS Instructors	0	12	84	4
Handicapped Students	0	23	74	3
Parents	1	18	79	2
Principals/Vice-principals	2	13	81	3
Other Program Specialists	1	14	83	2
Regular Class Teachers	0	50	49	2
Resource Specialists	0	11	85	4
School Psychologists	1	11	85	3
Special Class Teachers	0	27	70	3
Special Education Administrators	5	10	80	4

While 27% of program specialists are satisfied with the current definition of the role and responsibilities, 44% would make changes in the program specialist role. Table 21 lists the changes recommended. The most significant changes include increased authority and better definition of responsibilities. Program specialists interviewed would like more involvement in the "evolutionary process of the law" and more input into program decisions. Currently, it was said that program specialists are responsible for implementing programs developed by special education administration, but that their expertise is not being used in making those program decisions.

TABLE 20
Program Specialists Perceptions of Idealized Work Time Distribution
(N=97)

Activites by Area	Desired Frequency of Activities (%)			
	Less	More	Same	B/NA
Referral				
Assist school professionals in implementing referral procedures	9	11	75	4
Monitor overall referral process	2	6	86	6
Coodinate referrals of community agencies	2	6	87	5
Assessment				
Assist in coordination of assessments conducted by other professionals	3	10	81	5
Assist other personnel in the selection and utilization of appropriate assessment instruments and techniques	0	19	78	3
Instructional Planning				
Participate in development of Individualized Educational Programs (IEP)	2	10	85	3
Assist IEP Team in using assessment data for developing and/or modifying IEPs	0	5	91	4
Assist teachers in selecting materials and activities to meet goals and objectives of IEPs	1	34	62	3
Consult with parents regarding the educational planning process	0	19	79	2
Consult with other personnel in modifying regular education program for students who are ineligible for special education services	0	53	43	4
Placement				
Assist IEP (SAT/EAS) teams and other personnel in preparation for and follow-up of placement	0	3	93	4
Participate in the placement of students in non-public and state school programs and monitor progress of these students as requested	0	11	84	5
Participate in placement and review meetings in an advocacy role for students	2	16	74	8
Assist in assuring appropriate placement for each student	0	9	87	4
Instruction				
Provide ongoing consultation with teachers regarding new and innovative methods, approaches, and materials	0	56	41	3
Monitor to see that IEPs are appropriate and fully implemented	3	40	53	4
Coordinate use of curricular resources required for successful IEP implementation	2	47	46	4
Work with students one at a time	2	40	57	1
Work with small groups of students	3	33	60	4
Coordinate instructional program between the home and school	1	25	69	5

TABLE 20 (continued)
Program Specialists Perceptions of Idealized Work Time Distribution

Activites by Area	Desired Frequency of Activities (%)			
	Less	More	Same	B/NA
Student Review				
Assist teachers and others in documenting student progress	1	39	57	3
Assist teachers and other professionals in preparing for annual or requested reviews	3	9	85	3
Assist in assessing program effectiveness for students	1	38	59	2
Program Review				
Observe resource specialists, designated instruction and services instructors, and special class teachers	0	35	59	6
Coordinate informal and formal program reviews at school site and/or SESR level	4	17	75	4
Consult with teachers, administrators, and parents regarding the operational aspects of a program	6	19	69	6
Assist in identifying need for program change	1	26	69	4
Staff Development				
Design staff development activities based on needs assessment	3	43	51	3
Provided inservice on special topics as requested	1	35	62	2
Coordinate implementation of staff development activities	3	37	57	3
Program Development				
Assist in development of local comprehensive plan	2	39	57	2
Work with other school personnel in development and implementation of innovative programs	0	71	25	4
Assist in upgrading existing programs	0	49	47	4
Assist in development of handbooks and materials	3	26	69	2
Research				
Participate in research in SESR	6	51	35	8
Write research reports	1	35	58	6
Routine Activities				
Complete routine forms	43	0	54	3
Write reports	34	3	60	3
Travel for job related activities	22	16	59	4
Engage in telephone communication	23	2	7[illegible]	2

Table 21

Changes Recommended by Program Specialists for the Role

N=43

	Percentage
Increased authority	42
Better definition of responsibilities	33
More time for curriculum and program development	28
Leadership role: More involvement in assessment process and IEP team activities	14
Eliminate peer evaluations	14
Change in title	12
More administrative support	9
Salary increase	7
Less time on paperwork	4
Less time for meetings	4
Fewer changes in procedures	4
More time with parents, students and staff	4

The final section of results presented includes the perceptions of resource specialists regarding their own role functioning and perceptions of other school personnel pertaining to resource specialists.

Resource Specialists

One thousand and six resource specialists responded to the questionnaire. In addition, 20 resource specialists were interviewed on site in six SESRs. Data reported in this section are based primarily on the 1006 questionnaire respondents. Perceptions of the interviewees are added where they clarify or augment questionnaire data. Perceptions of 257 school personnel regarding the resource specialists' role and functioning have already been presented. These data will be summarized and incorporated in the resource specialist report to allow for comparisons of intended role functioning and perceived role functioning by resource specialists and other school personnel.

Demographic data concerning respondents and the resource specialist role are presented first. This will be followed by a presentation of the data organized around the questions of the study. A summary of case study information concerning resource specialists can be found in Appendix A and complete case study reports in Appendix B. Unless otherwise noted, all tables are based on an N of 1006. Percentages for respondents who did not answer or who felt the question was not applicable are reported as Blank/NA.

Personal Demographics

The largest percentage of resource specialists are in the 26-35 year old age range (38%). Thirty percent are 36-45, 23% are 46-55, 8% are 56 or older, and 1% are 25 or younger. They are predominantly female (80%) and Anglo (92%). Small numbers of Black (3%), Hispanic (2%), Asian (2%) and American Indian (1%) specialists responded to the questionnaire. Seventy-nine percent reported at least occasional contact with non-English speaking or limited English speaking handicapped students, while 20% indicated they never encounter LEP/NEP handicapped students. Eighty-six percent are not bilingual themselves. Forty-eight different languages were identified as being spoken by LEP/NEP handicapped students with 21 languages being spoken by bilingual resource specialists.

Role Demographics

Ninety-nine percent of the respondents reported their job title as being "Resource Specialist." A third (37%) listed the principal or vice-principal as their supervisor, 22% are supervised by program specialists, and 12% report to the director of special education. The remainder report to some special education administrator in the district or area. Less than one percent viewed the psychologist as their supervisor.

Most of the resource specialists (86%) have one aide. Nine percent reported 2 aides, while 3% reported having no aides. The vast majority work in one district (98%) and one school (89%). Nine percent work in two schools, 1% reported serving between 3-10 schools and another 1% serve 11-20 schools. Resource specialists work either in a special room in a school building (60%) or in a regular classroom (28%). Nine percent work in other locations such as a trailer or the school office. Seventy percent indicated that they do not have to travel. Of those resource specialists who do travel, 23% travel between 1-25 miles per week and only 7% reported traveling more than 25 miles to cover their responsibilities. Ninety miles was the largest area covered. Seven percent of the resource specialists are half time; 64% work between 21 and 40 hours per week as a resource specialist. Twenty-two percent indicate spending an additional ten hours per week on the job.

The majority of resource specialists in the sample serve primary (57%) and elementary (57%) age populations. Twenty-two percent work with middle grade students, 22% with secondary students and only 3% work with preschool students. (A resource specialist might serve several grade levels hence percentages exceed 100%.)

Many of the resource specialists have non-instructional duties. Table 22 lists these responsibilities. Only 11% of the respondents reported having no non-instructional duties.

TABLE 22

Perceived Non-Instructional Duties of Resource Specialists
(N = 1006)

Duties	Percentage*
Playground Supervisor	41%
Bus/Lunch Supervisor	20%
School Site Council	23%
District Committee Assignments	30%
Building Committee Assignments	42%

*Percentages do not total 100% since a resource specialist may have multiple duties.

Virtually all resource specialists (97%) are functioning under a teaching salary schedule. Forty-three percent reported earning $20,000-24,999 per year, 35% are in the $15,000-19,999 bracket. Twelve percent earn $25,000-30,000 per year and only 1% reported a salary under $10,000 per year.

Questions of the Study

1.0 DO PERCEIVED ACTIVITIES AND FUNCTIONS OF RESOURCE SPECIALISTS MATCH INTENDED ACTIVITIES AND FUNCTIONS?

The intended role of the resource specialist program was described in AB 1250 and modified in SB 1870 to include, but not be limited to, all of the following:

(1) Provision for a resource specialist or specialists who shall provide instruction and services for those pupils whose needs have been identified in an individualized education program developed by the individualized education program team and who are assigned to regular classroom teachers for a majority of a school day.

(2) Provision of information and assistance to individuals with exceptional needs and their parents.

(3) Provision of consultation, resource information, and material regarding individuals with exceptional needs to their parents and to regular staff members.

(4) Coordination of special education services with the regular school programs for each individual with exceptional needs enrolled in the resource specialist program.

(5) Monitoring of pupil progress on a regular basis, participation in the review and revision of individualized education programs, as appropriate, and referral of pupils who do not demonstrate appropriate progress to the individualized education program team.

(6) Emphasis at the secondary school level on academic achievement, career and vocational development, and preparation for adult life (EC 56362). The Commission for Teacher Preparation and Licensing has further operationalized the role of the resource specialist by detailing specific skills, knowledge, and performance competencies required for a resource specialist certificate of competence. These competencies are related to the following functions:

a) the consulting function,

b) the coordination function,

c) functions related to the implementation of laws, regulations, and other compliance requirements,

d) staff development and inservice education function,

e) the parent education function, and

f) the instructional function.

(see Appendix C).

For the present study, the data are organized to permit analysis of intended vs. actual role performance both in terms of these functions and specific activities relating to the entire process of education of individuals with exceptional needs. The first comparison of intended vs. actual role performance of resource specialists will address the specific responsibilities of resource specialists in referral, assessment, instructional planning and placement, instruction and review activities.

Role functioning. The majority of resource specialists indicated that they have either full (62%) or major (35%) responsibility for the overall management of a student's case from referral through placement and review of progress. For example, most elementary level resource specialists who were interviewed reported that they were the primary recipient (at the school site) of referrals for students not making appropriate progress; that they were responsible for consulting with personnel about the appropriateness of these referrals; that they conducted some type of assessment; (some, in addition, coordinate the assessment work of others) that as members of their school's IEP team, they helped in developing IEPs and making placement decisions; and all were involved in the review of students' progress. At the secondary level, resource specialists indicated involvement in the same type of activities, with the exception that frequently, referrals go to school counselors, not resource specialists.

When asked how they distributed their work time over the course of a school year in major areas of activities, resource specialists reported most of their time being spent in assessment, instructional planning and instruction. A third of the resource specialists (35%) spend more than 50% of their time in instruction. The vast majority (86%) spend less than 5% of their time on staff development and two-thirds spend less than 5% on referral (65%), placement (68%) and program development (68%) activities. Resource specialists view referral, assessment, planning, and placement activities as presenting the greatest demand on their time during the fall, with instruction having most emphasis in winter and student review activities greatest in the spring (see Table 23).

TABLE 23

Perceived Distribution of Resource Specialists' Time Between Major Areas of Work (Over a School Year)
(N=1006)

	Percentage of Time						Time of Year When Activities are Heaviest (%)			
Area of Work	0	1-10	11-20	21-30	31+	B/NA	Fall	Winter	Spring	Summer
Referral	3	82	5	1	*0	0	72	23	26	1
Assessment	*0	51	32	7	2	7	66	31	1	2
Instructional Planning	*0	60	28	3	1	7	63	30	1	3
Placement	1	86	3	*0	*0	10	61	31	26	2
Instruction	*0	3	6	8	77	6	43	54	49	4
Student Review	1	79	10	*0	1	9	23	22	69	5
Staff Development	10	76	0	0	0	14	43	21	20	0
Program Development	6	71	2	*0	1	21	36	16	19	6

* = <0.10%

Perceptions of the frequency of specific professional activities in each of these areas of work are found in Table 24. Perceived role functioning across the activities is operationally defined as the frequency with which the majority (over 50%) of resource specialists reported they engage in these activities. In the referral process, over three-fourths of the resource specialists are involved between 1-2 days a month and 1-2 days a week in receiving and screening referrals made by other school personnel (81%) and coordinating and monitoring referral procedures (76%).

During assessment, 89% reported being involved in conducting formal and/or informal assessment of students at least 1-2 days per week. Seventy-nine percent are occasionally to frequently involved in coordinating assessment procedures; 85% are involved at least 1-2 days a week in assisting parents and others in interpretation and utilization of student assessment findings. All of the resource specialists interviewed were responsible for academic testing. One respondent claimed that it was the resource specialist's job to do "most of the testing unless an IQ or personality test" was needed; then a psychologist was requested. A few resource specialists interviewed "take responsibility for coordinating assessment work done by other specialists" (e.g., psychologists, nurses, speech and hearing therapists). Some resource specialists reported doing sensory-acuity, sensory-motor and aptitude testing. In some schools resource specialists consulted with psychologists or program specialists on selecting appropriate tests for students and interpreting the findings.

Under instructional planning and placement, eighty-one percent of resource specialists are involved at least 1-2 days a week in coordinating the development of IEPs for handicapped students. The majority spend at least 1-2 days a month assisting teachers (80%) and consulting with parents

TABLE 24
Perceived Distribution of Work Time Across Specific Activities (Over a School Year)
(N=1006)

Specific Activites by Area	Amount of Time (%) *Never	Rarely	Occasionally	Frequently	Daily	B/NA
Referral						
Initiate referral process for specific students	6	17	**32	40	5	1
Refer special education students who do not indicate appropriate progress to the local IEP team	2	32	45	18	1	2
Receive and screen referrals made by other school personnel	3	5	25	56	10	1
Coordinate and monitor referral procedures for specific students at school site	3	4	23	53	16	[illegible]
Assessment						
Assist in interpretation and utilization of student assessment findings	0	1	13	63	22	1
Conduct formal and/or informal assessment of students	0	1	10	54	35	1
Assist parents in understanding assessment findings	0	1	13	63	22	1
Consult with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students	1	9	29	47	13	1
Secure parental consent to conduct assessment	1	3	32	57	5	2
Coordinate assessment procedures	2	4	22	57	13	2
Instructional Planning						
Assist teachers in selecting instructional methods and materials to meet goals and objectives of IEP	2	17	43	30	7	1
Coordinate the development of IEPs for handicapped students	0	1	16	61	20	2
Assist in coordination of IEP meetings	1	1	21	66	8	3
Consult with parents regarding the educational planning process	0	3	33	59	5	0
Consult with teachers in the utilization of evaluation data for modification of instruction and curriculum	4	20	44	27	4	1
Consult in the development of pre-vocational and/or vocational plans for handicapped students	35	[illegible]	18	11	1	4
Placement						
Participate with IEP team in making placement recommendations for handicapped students	1	1	28	63	6	1
Participate in placement and review meetings in an advocacy role for students	33	26	21	16	1	3

*Never = never engage in this activity
Rarely = 1-5 days per year
Occasionally = 1-2 days per month
Frequently = 1-2 days per week
Daily = more or less daily

** ▭ = categories of frequency in which the largest majority (over 50%) of resource specialists reported engaging in the activity.

TABLE 24 (continued)

Perceived Distribution of Work Time Across Specific Activities (Over a School Year)

	Amount of Time (%)					
Specific Activities by Area	Never	Rarely	Occasionally	Frequently	Daily	B/NA
Instruction						
Supervise instruction by Resource Specialist aide(s)	1	1	2	8	86	2
Coordinate implementation of special education services for handicapped students	1	6	19	42	31	1
Provide direct instruction to students whose needs have been identified in a written IEP and who are assigned to a regular classroom teacher for a majority of the school day	1	1	3	7	88	0
Work with handicapped students one at a time	4	10	15	23	48	0
Work with small groups of handicapped students	1	1	2	10	86	0
Coordinate implementation of activities of Resource Spec. Program with regular classroom curriculum	1	9	25	39	24	2
Student Review						
Assess student progress on a regular basis and revise IEPs as appropriate	1	3	19	50	27	0
Monitor progress of students who are no longer in the Resource Specialist Program	7	27	45	17	2	2
Conduct review meetings in accordance with legal requirements	2	4	33	56	3	2
Staff Development						
Provide resource information and materials regarding handicapped students to regular staff members	1	13	39	34	12	1
Consult with teachers in the application of classroom management techniques	5	25	44	21	4	1
Assist teachers in methods to enhance social and emotional development of handicapped students within the regular classroom	3	23	40	26	7	1
Coordinate inservice workshops on a variety of topics	21	52	22	4	0	1
Program Development						
Assist Program Specialists in developing and implementing innovative special education programs	38	39	16	4	0	2
Assist other professionals in upgrading existing special education programs	18	41	31	8	1	1
Routine Activities						
Complete forms and write reports	0	0	4	40	54	1
Travel for job related activities	12	37	34	11	4	2
Engage in telephone communication	0	1	[illegible]	44	47	1
Participate in meetings not directly related to classroom responsibilities	2	15	44	38	1	1

(97%) regarding instructional planning. Eighty-seven percent spend between 1-2 days a month and 1-2 days a week assisting in the coordination of IEP meetings, and 91% spend that much time participating with the IEP team in making placement recommendations. The majority of the specialists do not view their participation in placement meetings as being in an advocacy role. Sixty-six percent of the respondents rarely or never consult in the development of pre-vocational and/or vocational plans for handicapped students.

Ninety-five percent of the resource specialists provide direct instruction at least 1-2 days a week, 88% provide direct instruction daily. During their instructional time each day, 48% work with students one at a time (another 23% work one-to-one at least 1-2 times a week); a higher percentage (86%) work daily with small groups of handicapped students. Ninety-four percent of the specialists are involved in supervisoring instruction by resource specialist aides at least 1-2 days a week. In interviews, specialists reported training and supervising of aides is time consuming. However, they felt time spent working with aides was very important since given the nature of other resource specialist responsibilities (such as coordination of special education resources) they had to rely heavily on their aides to perform instruction. In all sites visited, aides were observed working with small groups of students.

Three-fourths of the resource specialists (77%) engage in review of student progress and revising of IEPs at least 1-2 times a week indicating this is an ongoing process. Some of the methods which resource specialists use to review students' progress were described in the interview case studies. They include evaluation and monitoring activities such as: periodic parent-student conferences, on-going telephone contact with students' parents, periodic reports exchanged with regular class teachers, and testing. In addition, most resource specialists who were interviewed conduct some kind of formal annual review of each student assigned to the Resource Specialist Program.

A majority of the resource specialists at least occasionally engage in informal *staff development* activities with regular teachers such as providing resource information regarding handicapped students (85%). However, over half (52%) rarely coordinate inservice workshops. Twenty-one percent never coordinate inservice and 22% do so occasionally. Very little time is spent in program development by the majority of resource specialists.

Most of the resource specialists engage in routine activities as part of their daily and weekly functioning. Ninety-four percent say they complete forms and write reports at least 1-2 times a week, and 54% engage in these activities daily. Telephone communication is another time consuming activity--nearly half (47%) have telephone communications as part of their daily professional activities. Eighty-three percent reported participating in meetings not directly related to their classroom responsibilities at least 1-2 times a month.

If the activities of resource specialists are examined by the *functional* areas described in the required competencies for resource specialists (consulting, coordination, implementation/compliance, staff development, parent education, and instruction) rather than "area" of work it can be seen that the majority of resource specialists carry out activities related to coordination and instruction at least 1-2 days a week. Many activities related to the consultation, parent education and implementation/compliance functions are engaged in by the majority at least 1-2 times a month. The least amount of time for the majority of specialists is spent on the staff development function (see Table 25).

From interview data, similar findings are reported regarding functions

TABLE 25

Perceived Distribution of Work Time Across Functions of Role (Over a School Year)
(N=1006)

Specific Activities by Function	Amount of Time (%) *Never	Rarely	Occasionally	Frequently	Daily	B/NA
Consultation						
Assist in interpretation and utilization of student assessment findings	0	1	13	**[63	22]	1
Assist teachers in selecting instructional methods and materials to meet goals and objectives	2	17	[43	30]	7	1
Consult with parents regarding the educational planning process	0	3	[33	59]	5	0
Assist other professionals in upgrading existing special education programs	18	[41	31]	8	1	1
Consult with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students	1	9	[29	47]	13	1
Consult with teachers in the utilization of evaluation data for modification of instruction and curriculum	4	20	[44	27]	4	1
Consult in the development of prevocational and/or vocational plans for handicapped students	[35	31]	18	11	1	4
Coordination						
Coordinate implementation of Special Education services for handicapped students	1	6	19	[42	31]	1
Supervise instruction by Resource Specialist aide(s)	1	1	2	[8	86]	2
Coordinate the development of IEPs for handicapped students	0	1	16	[61	20]	2
Receive and screen referrals made by other school personnel	3	5	[25	56]	10	1
Coordinate and monitor referral procedures for specific students at school site	3	4	[23	53]	16	1
Assist in coordination of IEP meetings	1	1	[21	66]	8	3
Coordinate implementation of activities of Resource Specialist Program with regular classroom curriculum	1	9	[25	39]	24	2
Coordinate assessment procedures	2	4	[22	57]	13	2

*Never = never engage in this activity
Rarely = 1-5 days per year
Occasionally = 1-2 days per month
Frequently = 1-2 days per week
Daily = more or less daily

** [ ] = categories of frequency in which the largest majority (over 50%) of resource specialists reported engaging in the activity.

TABLE 25 (continued)
Perceived Distribution of Work Time Across Functions of Role (Over a School Year)

Specific Activities by Function	Amount of Time (%) *Never	Rarely	Occasionally	Frequently	Daily	B/NA
Implementation/Compliance						
Assess student progress on a regular basis and revise IEPs as appropriate	1	3	19	30	27	0
Monitor progress of students who are no longer in the Resource Specialist Program	7	27	45	17	2	2
Participate in placement and review meetings in an advocacy role for students	33	26	21	16	1	3
Conduct review meetings in accordance with legal requirements	2	4	33	56	3	2
Secure parental consent to conduct assessments	1	3	32	57	5	2
Refer Special Education students who do not indicate appropriate progress to the local IEP Team	2	32	45	18	1	2
Parent Education						
Assist parents in understanding assessment procedures	0	1	13	63	22	1
Provide parents with basic understanding of remedial methods and techniques for their child	1	16	50	30	1	2
Counsel parents related to their child's abilities, including strengths and weaknesses	0	7	45	45	3	0
Provide parents with information as to effective utilization of community resources	6	44	39	9	0	2
Instruction						
Work with handicapped students one at a time	4	10	15	23	48	0
Work with small groups of handicapped students	1	1	2	10	86	0
Provide direct instruction to students whose needs have been identified in a written IEP and who are assigned to a regular classroom teacher for a majority of the school day	1	1	3	7	88	0
Staff Development						
Provide resource information and materials regarding handicapped students to regular staff members	1	13	39	34	12	1
Consult with teachers in the application of classroom management techniques	5	25	44	21	4	1
Assist teachers in methods to enhance social and emotional development of handicapped students within the regular classroom	3	23	40	26	7	1
Coordinate inservice workshops on a variety of topics	21	52	22	4	0	1

of the resource specialist. Almost unanimously, the specialists are viewed as being involved primarily in instructional activities. The coordination function varied slightly among the different SESRs. Primarily, the resource specialist is seen as a case manager for individual students, thus coordication refers to managing individual referrals--getting all the people involved in assessment and planning, but not coordinating the delivery of special education services within the school (e.g., the resource specialist is not seen as coordinating services of special class teachers or DIS personnel).

Summary of questionnaire and case study data. While resource specialists reported being involved in all aspects of delivery of services to individuals with exceptional needs, they reported most of their time being spent in assessment, instructional planning, and instruction activities. Perceptions of other school personnel coincide with these perceptions in that assessment, instructional planning, instruction, and review are the areas in which resource specialists are seen as having the most responsibility. Case study data also correspond to findings from questionnaire respondents.

Discrepancies between intended and actual functioning are very few. One area of difference is in assessment. The intended role only includes coordination of assessment not specification of an active role in assessment activities. Operationally, however, most school districts have found it practical to have resource specialists conducting as well as coordinating assessment activities (particularly academic assessments) for the IEP team. Emphasis on career and vocational development is another area of discrepancy. Two-thirds of the resource specialists rarely or never engage in development of vocational and/or pre-vocational plans, but nearly half of them feel they should be involved in this activity. However, only 22% of the specialists serve secondary programs and at the time of data collection this provision of law was very new, thus it is not surprising to not find this a prominent area of activity.

When the activities of resource specialists are examined by functions required for the certificate of competence it is evident that specialists do perform the required functions. Their primary involvement is in instructional activities either with individual students or small groups of students, and in coordinative functions ranging from coordinating the development of IEPs to supervising the instruction provided by aides. The one exception is in the area of staff development. Many of the resource specialists rarely provide either formal or informal inservice. Primarily they report that they just do not have enough time, for they also indicate that this is an area where they think they should be doing more--particularly in providing assistance to regular class teachers. Perceptions of other school personnel validate the resource specialists' self perceptions. In most cases a large majority of the school personnel with whom resource specialists interact agree that they are effective in carrying out these functions.

Question 2.0 ARE THE INTENDED RECIPIENTS BEING SERVED?

The average resource specialist reported having contact with 24-28 handicapped students a week, with 5 or more sessions per student, and with each session lasting 46-60 minutes. Sixty-eight percent indicated that their monthly caseload is between 24-28. Twenty percent reported working with fewer than 24 students a month and 11% reported working with more than 28 students with the largest number being reported as 80 students. The average resource specialist reported 19 as the smallest number of students assigned in any given month and 28 as the largest number assigned in a month. However, nineteen percent reported between 29 and 40 students assigned in a month. Over the course of a year, students enter and leave the program for various reasons. Fifty percent of the resource specialists had between 29 and 40 students assigned during the entire school year. Seventeen percent were assigned between 41-75 students over the school year.

Nearly all (91%) resource specialists have daily contact with students. In addition to these contacts they interact with a number of other individuals in work situations. Table 26 provides the perceived frequency

TABLE 26

Perceived Frequency of Resource Specialists' Professional Contact With Other Individuals (N=1006)

Individuals	Frequency of Contact (%)					
	*Never	Rarely	Occasionally	Frequently	Daily	B/NA
1. Coordinators of Non-special Education Programs	13	36	25	16	8	2
2. Community Agencies	13	52	30	4	0	1
3. Designated Instruction and Services Instructors	3	8	19	49	22	1
4. Handicapped Students	<1	1	2	4	91	1
5. Parents	0	5	21	62	11	1
6. Principals/Vice-principals	0	1	7	28	63	1
7. Program Specialists	3	20	49	25	2	1
8. Regular Class Teachers	<1	<1	3	15	81	1
9. Other Resource Specialists	<1	12	42	20	24	1
10. School Psychologists	1	6	27	59	6	1
11. Special Class Teachers	6	20	18	27	28	1
12. Special Education Admin.	5	33	44	13	3	2

*Never means no contact whatsoever
Rarely means contact 1-5 times per year
Occasionally means contact 1-2 times per month
Frequently means contact 1-2 times per week
Daily means contact more or less daily

of these contacts. A majority of resource specialists indicate daily contact with regular class teachers (81%) and principals (63%), and have contact 1-2 times per week with parents (62%), psychologists (59%), and DIS instructors (49%). Nearly half (49%) of the resource specialists only have contact with program specialists 1-2 times per month, while another 25% have contact 1-2 times per week with program specialists. While a majority (55%) of specialists have frequent to daily contact with special class teachers, 18% only have contact 1-2 times a month and 20% rarely have contact with special class teachers.

In interviews with resource specialists and others, the following comments were made about the "nature" of interactions during formal procedures. Speech therapists said that resource students frequently have speech and language difficulties, and the therapist "received requests from the resource specialist for testing." Psychologists suggested part of the job was to "help resource specialists interpret and assess findings and suggest tests that can be used." All resource specialists interviewed reported contact with parents and school professionals to discuss "assessment" of students.

Resource specialists and others also reported on-going informal interaction with school personnel, especially regular classroom teachers, in relation to students and programs. Although these informal consultations generally were restricted to handicapped students, there was a "spill-over effect" for other students. One resource specialist mentioned spending about "1-2 hours a week consulting with special day and regular class teachers in program development for their classes as part of informal staff development." Throughout the interviews, resource specialists and others spoke of informal meetings at "lunch," in "carpools" or extemporaneously, during which consultation about individuals or programs occurred. Regular classroom teachers reported that resource specialists "brief" them on handicapped students in their classes and on their observations of classroom activities. Resource specialists offer suggestions (in relation to individual students and programs) and work with regular classroom teachers to coordinate schedules. In general, special day class teachers reported limited contact with resource specialists. Contact was reported usually to be related only to placement decisions, thus limiting exchange of expertise between these special education personnel. There were exceptions, however, and some special day class teachers confirmed that resource specialists often gave them "ideas and materials to help in work with the class."

Although the interview sample was limited, there seemed to be some consistency in the findings about contact between resource specialists and program specialists. In one district with increasing enrollment and a low SES, resource specialists never saw a program specialist. Principals in this district spoke of requesting services from program specialists and receiving no reply. In another SESR where assignments were geographic but district and school sites were far apart, resource specialists knew the program specialists but rarely called upon them, unless some questions about compliance were raised.

The high school resource specialists interviewed in two different SESRs had contact with a program specialist. In one of these districts, program specialists were assigned to work at specific schools twice a week, so contact was routinized. Program specialists were used by high school resource specialists for advice on testing and for their knowledge of (and in one case, ability to purchase) appropriate materials for high school students.

Table 27 shows the number of individuals in each role the resource specialists interact with during a week. In addition to the caseload of handicapped students, the average resource specialist sees between 2-4 parents a week, 10-15 regular class teachers, and 1-2 DIS instructors a week. Half of the sample (55%) have contact with one program specialist during a typical week, while over a third of the resource specialists (35%) reported having no weekly contact with a program specialist.

TABLE 27

Perceived Number of People Resource Specialists Have Contact With Per Week (%)
(N=1006)

Role of Person	Number of People						
	0	1-5	6-10	11-20	21-30	31+	B/NA
Designated Instruction and Services Instructors	10	86	1	<1	<1	<1	2
Handicapped Students	1	2	1	12	66	16	2
Parents	3	78	14	2	1	<1	2
Principals/Vice-Principals	0	97	1	0	0	0	2
Program Specialists	35	61	0	<1	0	<1	4
Regular Classroom Teachers	<1	14	26	40	13	6	1
Other Resource Specialists	27	66	2	1	<1	<1	4
School Psychologists	9	89	<1	0	0	<1	2
Special Class Teachers	26	70	1	<1	<1	<1	3

Summary. SB 1870 defines individuals with exceptional needs, their parents, and regular staff members as recipients of the services of resource specialists. Resource specialists perceive themselves as providing effective services to all of these groups, and other school personnel agree that resource specialists are most effective with students, parents, and regular class teachers. Caseload is defined in law as an average of 24 students and is not to exceed 28 students. In general, it seems that most of the specialists are not serving more than 28 students, although 11% reported working with more than 28 students and some specialists interviewed indicated that they did work with students who were not "officially" in the program.

3.0 HOW WELL PREPARED ARE RESOURCE SPECIALISTS TO PERFORM THE INTENDED ROLE?

According to SB 1870:

> "The resource specialist program shall be under the direction of a resource specialist who is a credentialed special education teacher, who has had three or more years of teaching experience, including both regular and special education teaching experience, as defined by rules and regulations of the Commission for Teacher Preparation and Licensing, and who has demonstrated the competencies for a resource specialist, as established by the Commission for Teacher Preparation and Licensing." (EC 56362)

The resource specialists in the sample reported holding various regular and special education credentials. Seventy-eight percent have elementary credentials; 28% have secondary credentials, and 4% have credentials enabling them to teach in community colleges. Eleven percent have some type of administrative or supervision credential; 7% report holding a pupil personnel services credential, 7% have a reading specialist credential, and 2% have an early childhood specialist credential. Twelve percent of the resource specialists have some general special education credential. Eighty-one percent have an LH credential, 8% have an SH credential. Fewer than 1% hold PH, CH, or speech credentials. Perhaps indicating some confusion, 5% of the sample reported holding a resource specialist credential. (Data were collected prior to passage of the regulations for the resource specialist certificate of competence.)

Sixty-nine percent of the resource specialists have a master's degree;

over half (38%) are in special education. Other master's degree areas include general education (9%), counseling/school psychology (4%), reading/language (4%), administration (3%). Fourteen of the resource specialists (1%) reported having completed a doctorate.

In terms of experience, two years was most frequently given (29%) as the length of time the respondent had been a resource specialist in the district or county of current employment. Twenty-one percent reported 3 years, 19% reported 4-5 years, and 6% reported 6-7 years. Eighteen percent of the respondents have been working as resource specialists for one year. Ninety-five percent of the respondents reported having experience as a special education teacher prior to becoming a resource specialist, 77% have regular teaching experience. Other professional experience reported includes: reading specialist (7%), counselor (3%), coordinator (3%), elementary administrator (3%), director of special education (3%), and speech therapist (2%).

When asked about their familiarity with special education laws, 70% of the resource specialists reported that they are very familiar with PL 94-142. Another 29% are somewhat familiar and 1% are not familiar with this federal law. In terms of the old California Master Plan for Special Education (AB 1250), 47% are very familiar, 44% somewhat familiar and 9% not familiar with this state law. Compared to familiarity with SB 1870, slightly fewer reported being either very familiar (43%) or not familiar (5%), with more resource specialists (52%) being somewhat familiar with the current state special education law.

When asked what was the best preparation for their current job, 69% of the resource specialists identified formal coursework, 62% said inservice/workshops, and 55% said informal professional activities such as discussions with other professionals were important. Twenty-seven percent felt conventions were useful and 26% identified journals as contributing to good preparation. On-the-job experience was another frequently identified source of preparation. (Percentages exceed 100% because a respondent might specify multiple areas.) Specialists who were interviewed specified inservice and on the job training as more useful than formal training and mentioned their own experiences as parents as providing them with an understanding of the needs of children.

Table 28 lists specific skills relevant for the functioning of resource specialists. A much higher percentage of respondents indicated they had job-related experience than formal training in all skill areas. However, in general, a majority of specialists reported both formal training and job experience which enabled them to feel very skilled in these areas. They felt particularly well prepared and skilled in instructing special education students. Areas where many did not believe they were skilled were in using tests for assessing social needs of special education students (23%) and in test development (23%). These were also the areas where fewer specialists had training and job experience.

Specialists indicated some discomfort with their role in mainstreaming. While nearly all had relevant training and job experience, less than half of the specialists felt they were very skilled in socially integrating special education students, in coordinating resources and services, and in working with other educational personnel in providing services to special education students.

When asked about the requirements for certification of resource specialists, 35% of the specialists agreed with the regulations on the Resource Specialist Certificant of Competence. Twenty-six percent disagreed with the

TABLE 28

Perceived Training, Experience and Skill of Resource Specialists in Specific Special Education Areas (N=1006)

	Formal Training (%)		Job-related Experience (%)		Degree of Skill (%)		
	Yes	No	Yes	No	Not Skilled	Somewhat Skilled	Very Skilled
Screening students for special education	82	14	95	1	1	28	69
Processing referrals of students for special education	65	28	94	2	1	24	74
Using tests for assessing the educatonal needs of special education students	90	7	94	1	1	25	72
Using tests for assessing social needs of special education students	54	41	66	27	23	58	17
Using observations for assessing the needs of special education students	79	16	93	2	2	46	50
Developing tests for assessing the needs of special education students	55	40	70	24	23	52	23
Developing IEPs for special education students	82	14	94	1	1	22	76
Using the IEP for instructional purposes	74	21	94	1	1	26	71
Instructing special education students in academic areas	91	6	94	1	0	11	87
Socially integrating special education students in the classroom	61	33	87	8	6	51	40
Coordinating resources and services for special education students	58	36	91	5	3	52	42
Working with other educational personnel in providing services to special education students	57	36	91	5	3	52	42
Communicating with parents of special education students for whom you are responsible	68	27	94	1	1	26	71
Using observation techniques for assessing teacher effectiveness	52	41	71	23	16	52	28

requirements and 31% reported not being familiar with the requirements. When asked for recommendations for certification, the most frequently mentioned areas of training and experience which were not already specified in the requirements included assessment and diagnosis, public relations and counseling, and time management/organizational skills. Specialists who were interviewed stressed the importance of teaching experience, particularly regular classroom experience and felt that student teaching under a resource specialist would be very helpful. They reiterated the need for more training in assessment, particularly vocational/prevocational assessment, as well as public relations and counseling.

Summary.

The competency requirement for resource specialists was not yet finalized at the time of data collection, thus there is no information on the number of respondents who were able to demonstrate the required competencies. Information on credentials and experience, however, indicate that most, but not all resource specialists have the required credentials and experience. In general, resource specialists felt very skilled in carrying out the specific activities that are part of their job requirements, and felt that a combination of formal coursework, inservice/workshops, and informal, on the job professional activities provided them with the training they need. Other school personnel agreed that resource specialists have sufficient knowledge, skills, and experience to provide the services required by the role.

4.0 HOW IS THE RESOURCE SPECIALIST ROLE PERCEIVED TO RELATE TO OTHER PROFESSIONAL ROLES IN THE EDUCATIONAL SYSTEM?

Resource specialists view their role and responsibilities as distinctly different from administratrors. However, many perceived overlap in responsibilities with DIS personnel (50%), school psychologists (58%), special class teachers (41%), and regular class teachers (60%). Despite this perceived overlap in responsibilities with a variety of personnel, the only real role conflict is seen as existing with regular class teachers (38%) and with school psychologists (24%) (see Table 29). These perceptions are reflected in interview data as well.

TABLE 29

Perceived Role Relationships of Resource Specialists With Other Personnel (N=1006)

	Role Responsibilities (%)				Degree of Conflict (%)			
Resource Specialists with:	Different	Overlap	Identical	B/ Don't Know	*N	S	M	EX
D.I.S. Instructors	43	50	1	3	71	19	2	1
Principals/Vice-principals	75	22	0	0	71	17	3	1
Program Specialist	56	35	1	4	69	16	4	1
Regular Class Teachers	36	60	1	0	48	38	5	1
Other Resource Specialists	16	25	47	8	74	10	2	2
School Psychologists	39	58	1	2	62	24	5	2
Special Class Teachers	50	41	2	4	79	9	1	0
Special Education Administrators	74	19	1	4	68	18	3	1

*N = No conflict
S = Some conflict
M = Much conflict
Ex = Extreme conflict

The views of other school personnel in both interviews and questionnaires correspond closely to the resource specialists' own perceptions of overlapping responsibilities. One difference is with program specialists. Other than administrative personnel, resource specialists perceive less overlap with program specialists than with any other roles; whereas many other school personnel view the program and resource specialist roles as having overlapping responsibilities. This may be a function of the lack of understanding many school personnel have regarding the overall nature of the program specialist role. Thus, these specialists are seen as performing activities and functions similar to the resource specialist.

Related to role conflict, other school personnel agree with resource specialists that the greatest conflict in role responsibilities is with regular class teachers and school psychologists. This likely reflects the shared responsibility for instruction between resource specialists and regular class teachers and the increasing role resource specialists seem to be playing in assessment. Specific problems noted in interview data between resource specialists and regular class teachers deal with a lack of clarity in terms of role definition. The regular teacher often views the specialist as a "tutor," whose job is to assist the handicapped student in completing work assignments given in the regular class. Resource specialists view their responsibility toward a student as working on a general problem (e.g., reading deficit) and want to use their own curriculum and instructional practices.

5.0 WHAT SPECIFIC ORGANIZATIONAL, PERSONAL OR ROLE DEMOGRAPHIC VARIABLES INFLUENCE PERCEIVED ROLE FUNCTIONING.

Several personal, organizational and/or role demographics were hypothesized to be related to overall functioning of resource specialists. Number of years of experience and grade level served are variables which relate to certain aspects of functioning. Data are summarized for each of these variables.

Number of years experience in role. In general, the number of years of experience seemed to make no difference in terms of perceived extent of involvement in the various activities described for role functioning. No differences were noted in perceptions of role relationships with other personnel or perceived conflict with other personnel according to the number of years in the role; likewise the resource specialists with differing amounts of experience in the role seemed to feel equally effective with those they serve. The only area in which the specialists differed slightly according to experience was in terms of job satisfaction. Seventy-one percent of the specialists who had been in the role only one year are quite to extremely satisfied. After two years the percentage was 73%, after three years 76%, and 78% after four years. After 5 years of functioning as resource specialists, job satisfaction leveled off at 72% who are quite to extremely satisfied. When interviewed, resource specialists who were relatively new on the job indicated they felt overwhelmed. Those with more experience were more comfortable with most aspects of the job.

Grade level served. The variable which did seem to interact in how resource specialists function was that of grade level served. In general, primary and elementary resource specialists reported more non-instructional duties than resource specialists working at the secondary level.

In terms of specific activities representative of the functions resource specialists are supposed to perform, there was no difference in the extent to which elementary and secondary resource specialists coordinate implementation of special education services for handicapped students. A larger percentage of elementary than secondary resource specialists (66% to 50%) reported that they consult with regular classroom teachers at least one to two days a week in the identification and assessment of learning and behavioral patterns of handicapped students. Secondary specialists interviewed indicated contact with regular class teachers as a problem because of the large number of teachers in a high school with whom they should interact for each student. There is no difference in the extent to which specialists at different levels of the educational system conduct review meetings in accordance with legal requirements (compliance/implementation function). There is also no difference between specialists functioning at different levels of the system in the extent to which they provide parents with a basic understanding of remedial methods and techniques for their child (parent education function). In terms of coordinating inservice workshops on a variety of topics (staff development function), 32% of secondary resource specialists never coordinate inservice; 14% of elementary resource specialists never coordinate inservice workshops. Roughly 25% of the specialists at each level occasionally coordinate inservice activities.

When asked how they divided their time in the major areas of their work, there were no differences by age level served in the amount of time spent in referral. For all specialists this was a low percentage activity. A higher percentage of elementary than secondary resource specialists (51% to 38%) reported spending more than 10% of their time on assessment. No differences were reported between the two groups for instructional planning and placement activities. A slightly higher percentage of secondary than elementary resource specialists reported spending more than 10% on instruction (100% to 93%). No differences were reported in student review or program development activities--both low percentage activities. A slightly higher percentage of elementary than secondary specialists reported spending any time on staff development (90% to 82%). No real differences were reported between elementary and secondary resource specialists in their feelings of overall responsibility for the management of a student's case.

No real differences were reported between elementary and secondary resource specialists in the number of sessions per week with students they serve, although a higher percentage of secondary sessions last 46-60 minutes. There seems to be no difference between elementary and secondary resource specialists in terms of caseload of students or in the numbers of other people they have contact with in their work.

In terms of perceptions of role relationships and conflict with other professionals the only area of differences according to the level served related to special class teachers and special education administrators. A larger percentage of secondary than elementary specialists reported both overlap (52% to 40%) and conflict (20% to 8%) with special class teachers. Likewise, a larger percentage of secondary than elementary specialists reported both overlap (28% to 16%) and conflict (32% to 19%) with special education administrators.

Some secondary level specialists who were interviewed indicated frustration at having to provide instruction in multiple subject areas in which they themselves did not feel they had the background. However, in general, the level in which the resource specialist works does not seem to affect either perceived effectiveness in providing services to others or in the satisfaction felt with the work as a resource specialist.

6.0 HOW EFFECTIVE IS THE PERCEIVED FUNCTIONING OF RESOURCE SPECIALISTS?

In spite of perceived problems and changes they would make in the role, resource specialists feel they are effective in their current functioning. As can be seen in Table 30, resource specialists reported being most effective with handicapped students, principals, and parents, followed by regular class teachers and school psychologists. They feel they are least effective with special class teachers perhaps partially because of limited contact.

The views of other school personnel corroborate the perceptions of the resource specialists.

From interview data specialists reported viewing themselves as most effective in providing direct instruction, in providing organization and coordination from referral through review, and as being a resource to the regular staff. One paradox in the role functioning of resource specialists is that in spite of perceiving (and being perceived by others) as being effective with regular class teachers; as previously discussed, both resource specialists and other school personnel note that there is conflict between the roles of resource specialist and regular class teachers.

TABLE 30

Perceived Effectiveness of Resource Specialists in Providing Services
(N=1006)

Provide Services For:	Degree of Effectiveness (%)				
	Not	Somewhat	Quite	Extremely	B/NA
D.I.S. Instructors	6	31	42	14	7
Handicapped Students	0	5	46	48	1
Parents	1	23	52	24	1
Principals/Vice-principals	2	15	53	27	2
Program Specialists	8	27	42	15	8
Regular Class Teachers	2	26	52	19	1
Other Resource Specialists	7	30	42	16	5
School Psychologists	3	24	50	20	3
Special Class Teachers	12	32	34	12	10

Resource specialists indicate a sensitivity in this area and feel they should be providing more assistance to regular class teachers.

Data on the perceptions of school personnel regarding the effectiveness of resource specialists in specific activities and functions have been presented in the section on school personnel. In general, resource specialists are perceived as providing very effective services in assessment, instructional planning, and instruction. Criticism of resource specialists is scanty in either questionnaire or interview data. One problem noted in interviews relates to scheduling. Often a student misses important instruction in the regular class while he/she is working with the resource specialist. Regular teachers feel that some of these problems could be avoided by coordinating time better.

As previously reported, over three-fourths of the school personnel responding to the questionnaire reported being personally satisfied with resource specialists' services and also agreed that resource specialists are needed for the successful implementation of the Master Plan. Individuals interviewed for the case studies including several parents were also generally positive about their own interactions with resource specialists.

7.0 WHAT PROBLEMS ARE PERCEIVED AS IMPEDING EFFECTIVE ROLE FUNCTIONING OF RESOURCE SPECIALISTS?

Nearly three-fourths (74%) of the resource specialists reported being quite to extremely satisfied with their work. Another 21% are somewhat satisfied and only 5% are not satisfied as resource specialists. Problems which are perceived as preventing them from carrying out their job requirements focus primarily on lack of time and too large of a caseload (see Table 31). Other specialists have cited lack of support as a moderate problem, indicating that many regular education personnel still perceive "special education" and thus the resource specialist program negatively. The specialists have to spend considerable time with regular teachers in order to overcome this perceived bias.

Quality of resource specialist aides was also cited as a factor. Specialists spend a significant amount of time training and supervising aides and in many cases there is a frequent turnover because there is no long term commitment (e.g., college students) or because of the low pay scale. The level of skills of the aide is seen as critical since they are doing teaching while the resource specialist is coordinating and consulting with other personnel.

Other problems mentioned include paperwork overload (and constantly changing forms) and inadequate facilities. Specialists interviewed reiterated these problems, and in addition cited referral and assessment responsibilities as cutting into time for direct instruction.

As previously reported, 53% of the school personnel agreed that resource specialists should have smaller caseloads and 39% agree that resource specialists do not have enough time to perform their duties. Many personnel interviewed felt that having specialists split their time between sites was very inefficient and reduced effectiveness of the program.

TABLE 31

Perceived Problems Which Impair Fulfillment of Job Requirements
(N=1006)

Problem	Degree of Problem (%)				
	Not	Slight	Moderate	Extreme	B/NA
1. Administrative problems at SESR level	55	23	11	4	7
2. Administrative problems at local level	44	31	17	7	2
3. Lack of authority to carry out duties	60	21	10	6	3
4. Lack of time	8	16	35	39	1
5. Lack of support from others	36	35	22	5	2
6. Caseload too large	24	25	28	21	2
7. Lack of training in specific areas	51	36	9	2	3

8.0 WHAT CHANGES IN THE RESOURCE SPECIALIST ROLE AND RESPONSIBILITIES ARE NEEDED TO INCREASE EFFECTIVENESS?

Resource specialists expressed clear views on how the role should ideally be carried out. Table 32 illustrates the idealized contact of resource specialists with other individuals in work situations. It can be seen that about a third of the resource specialists would like to have more contact with community agencies (40%), school psychologists (32%) and other resource specialists (36%). Many would like more contact with parents

TABLE 32

Desired Frequency of Contact of Resource Specialists With Other Individuals (N=1006)

	Degree of Contact (%)			
	Less	More	Same	B/NA
1. Coordinators of Non-special Education Programs	1	19	75	5
2. Community Agencies	0	40	56	3
3. Designated Instruction and Services Instructors	1	16	80	4
4. Handicapped Students	2	9	85	4
5. Parents	1	26	69	4
6. Principals/Vice-principals	3	6	88	3
7. Program Specialists	5	28	63	4
8. Regular Class Teachers	1	16	80	3
9. Other Resource Specialists	0	36	60	3
10. School Psychologists	1	32	63	4
11. Special Class Teachers	1	16	78	4
12. Special Education Administrators	3	30	63	4

(26%), program specialists (28%) and special education administrators (30%). Eighty-five percent feel they have the right amount of contact with handicapped students.

Resource specialists are generally satisfied with the distribution of their time across the many activities related to role functioning. Table 33 lists their perceptions of how time should be spent on specific activities. Many resource specialists would like to spend more time working with regular classroom teachers. Over half of the resource specialists (51%) would like to spend more time consulting with teachers in the utilization of evaluation data for modification of instruction and curriculum, 50% feel they should be spending more time assisting teachers in selecting instructional methods and materials to meet goals and objectives of IEPs. A third (36%) would like to spend more time consulting with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students, as well as coordinating the implementation of the activities of the resource specialist program with the regular classroom curriculum (35%). A third would like to spend more time working one-to-one with handicapped students (35%), and in monitoring the progress of students who are no longer in the resource specialist program (34%). Forty percent would like to spend more time in the development of vocational plans for handicapped students.

Nearly half of the resource specialists sampled reported they would like to spend more time providing both formal and informal staff development activities, as well as participating in innovative program development activities. In addition, nearly half believe more time should be spent assisting parents in understanding the program being provided to their child and providing information on how to effectively utilize other community resources besides the school. Fifty-eight percent would like to spend less

TABLE 33

Resource Specialists' Perceptions of Idealized Work Time Distribution
(N=1006)

Activites by Area	Desired Frequency of Activities (%)			
	Less	More	Same	B/NA
Referral				
Initiate referral process for specific students	8	7	79	6
Refer special education students who do not indicate appropriate progress to the local IEP team	2	13	79	7
Receive and screen referrals made by other school personnel	8	7	80	5
Coordinate and monitor referral procedures for specific students at school site	9	6	80	5
Assessment				
Assist in interpretation and utilization of student assessment findings	4	8	82	6
Conduct formal and/or informal assessment of students	8	8	78	6
Assist parents in understanding assessment findings	4	8	82	5
Consult with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students	1	36	58	4
Secure parental consent to conduct assessment	7	3	85	5
Coordinate assessment procedures	7	8	78	7
Instructional Planning				
Assist teachers in selecting instructional methods and materials to meet goals and objectives of IEP	1	50	43	6
Coordinate the development of IEPs for handicapped students	7	5	82	6
Assist in coordination of IEP meetings	9	3	82	5
Consult with parents regarding the educational planning process	2	23	69	6
Consult with teachers in the utilization of evaluation data for modification of instruction and curriculum	1	51	43	5
Consult in the development of pre-vocational and/or vocational plans for handicapped students	2	40	49	9
Placement				
Participate with IEP team in making placement recommendations for handicapped students	4	4	85	6
Participate in placement and review meetings in an advocacy role for students	3	18	70	10
Instruction				
Supervise instruction by Resource Specialist aide(s)	2	7	35	6
Coordinate implementation of special education services for handicapped students	4	12	78	6

TABLE 33 (continued)

Resource Specialists' Perceptions of Idealized Work Time Distribution

Activites by Area	Desired Frequency of Activities (%)			
Instruction (continued)	Less	More	Same	B/NA
Provide direct instruction to students whose needs have been identified in a written IEP and who are assigned to a regular classroom teacher for a majority of the school day	4	15	75	6
Work with handicapped students one at a time	2	35	58	4
Work with small groups of handicapped students	2	14	78	5
Coordinate implementation of activities of Resource Spec. Program with regular classroom curriculum	1	35	58	5
Student Review				
Assess student progress on a regular basis and revise IEPs as appropriate	6	13	75	6
Monitor progress of students who are no longer in the Resource Specialist Program	3	34	57	6
Conduct review meetings in accordance with legal requirements	7	4	83	6
Staff Development				
Provide resource information and materials regarding handicapped students to regular staff members	2	45	48	6
Consult with teacher in the application of classroom management techniques	2	43	50	4
Assist teachers in methods to enhance social and emotional development of handicapped students within the regular classroom	1	50	44	4
Coordinate inservice workshops on a variety of topics	5	46	43	6
Program Development				
Assist Prog. Specialists in developing and implementing innovative special education programs	2	48	42	8
Assist other professionals in upgrading existing special education programs	2	51	42	6
Parent Education				
Provide parents with basic understanding of remedial methods and techniques for their child	1	47	47	5
Counsel parents related to their child's abilities, including strengths and weaknesses	1	29	64	6
Provide parents with information as to effective utilization of community resources	1	48	46	6
Routine Activities				
Complete forms and write reports	58	1	35	6
Travel for job related activities	10	19	65	7
Engage in telephone communication	16	8	72	4
Participate in meetings not directly related to classroom responsibilities	33	5	58	4

time on paperwork and 33% view less time spent in meetings not directly related to classroom responsibilites as desirable.

Seventy percent of the respondents indicated they would like to see changes in the role and responsibilities of resource specialists. Primarily, recommended changes focused on less paperwork, smaller caseload, and more time for instruction and curriculum development as well as a better definition of responsibilities. A number of resource specialists interviewed in the case studies blamed continual changes in legislation as creating additional paperwork. New forms and procedures had to be learned in addition to what was already required. "Red tape" increased rather than diminished, even though resource specialists had learned to function more effectively in their positions over time. Perpetual changes in the law were also seen as one reason for the bad reputation special education personnel had with regular classroom teachers. Constant changes in forms, procedures and program direction looked "bandwagony," they felt. Table 34 is a summary of recommended changes.

Table 34

Changes Recommended by Resource Specialists For the Role

N=624

	Percentage
Less time on paperwork	33
More time for instruction and remediation	17
Smaller caseload	16
Salary increase	14
Better definition of responsibilities	13
Better cooperation between teachers and psychologists	10
More release time	9
More administrative support	3
More time with staff and parents	8
Less administrative responsibilities	8
More time for curriculum and program development	7
More specialization of role	7
Increased authority	6
Fewer regulations/laws	6
Leadership role: More involvement in assessment and IEP activities	5
Increased clerical help	5
Less time for meetings	4
More time to provide counseling	3
Better facilities for teaching/testing	3
More flexibility in job definition	3
Working with regular students	1

PART III

Summary and Recommendations

The purpose of the study described in this report was to generate information to clarify the actual functioning of program specialists and resource specialists compared to intended roles as currently defined in law. Case study interview data from a sample of six SESRs operating under the Master Plan and questionnaire data from a sample of program and resource specialists and other school personnel in 20 SESRs have been collected and analyzed. Specifically, questionnaire data from 97 program specialists, 1006 resource specialists, 257 other school personnel; and interview data from six program specialists, 20 resource specialists, and 69 other school personnel and parents form the basis for the findings reported herein. Summary and recommendations based on the questions of the study will be presented separately for program specialists and for resource specialists.

Program Specialists

Variation among the SESRs in the state necessitates flexibility in functioning, within the limits of the law. Obviously, a rural consortium in an isolated part of the state has different needs and possibly a different population of students than an urban center, single district SESR. The creation of an organizational unit to administer the Master Plan brings with it preexisting local sentiments. For example, the relation of any district to the county office has a history that predates the Master Plan, whether positive or negative, and often creation of a new consortium does not substantially alter that prior relationship. In addition to governance arrangements, (e.g., consortium, county, single district); actual size of the SESR, wealth of the area, unique characteristics of the population (e.g., migrant workers, non-English speaking families), the available personnel pool and other variables influence the operation of the SESR. In general, the functioning of program specialists mirrors the overall variability evident among different SESRs, thus generalization of the performance of program specialists is very difficult. The specialists were characterized by diversity of functioning rather than similarities, according to the local needs of the SESR in which they worked. Sometimes the specialists were seen as effectively meeting these local needs, sometimes not. For purposes of discussion, the operational definition of what the specialists actually do (or perceive that they do) has included specification of activities and functions engaged in by a majority of program specialists. However, the reader, in making judgments about the perceived role of the specialists versus the intended role must bear in mind that there are many differences in the ways in which the specialists carry out the role.

Issues which have been identified as important in determining the nature and scope of functioning of program specialists will be presented within the context of the questions of the study. In general, findings are supportive of the notion that the role of the program specialist should be broadly defined at the state level and specifically defined by each SESR according to the unique characteristics and needs of the SESR.

QUESTION 1.0: DO PERCEIVED ACTIVITIES AND FUNCTIONS OF PROGRAM SPECIALISTS MATCH INTENDED ACTIVITIES AND FUNCTIONS?

Education Code section 56368 specifies the functions of the program specialist role, to include: observing, consulting, assisting, planning, coordinating and monitoring. These functions were operationalized into specific activities relating to the entire process of education of individuals with exceptional needs by the Commission on Special Education. These two sources provide the basis for the definition of intended role functioning.

Many of the program specialists perceived that being a case manager is a major part of their role responsibility. They are aware of the nature and variety of programs and resources available in the SESR and are likely to be called upon to provide assistance and information to those directly responsible for the delivery of services to handicapped students. While some specialists have responsibility for all programs in a particular geographical area, others function with major responsibiity for specific programs (the majority being the learning handicapped programs). Perceptions of program specialists themselves and of other school personnel concur that most of the specialists' time is spent in instructional planning and placement (usually IEP development not curriculum planning), student review, and routine activities. Less time is spent in instruction, program development, assessment, referral, program review, staff development or research activities.

In terms of functions, program specialists spend more time observing, consulting, assisting, and monitoring than planning and coordinating. In many of the SESRs, monitoring for compliance (particularly IEP implementation) is a primary function, especially in those SESRs that are implementing the Master Plan for only the first or second year.

While most program specialists are carrying out the intended functions and activities of the role to some degree, there are notable variations, particularly in the areas of program development, staff development, and coordination. A majority of the specialists feel they should spend more time on program development and a third feel more involvement in staff development is needed. In many SESRs the lack of time spent on development and implementation of innovative programs is a reflection of a priority on compliance or implementation of required programs. In other SESRs it is simply the case that the requirements of the job are so time consuming, either because of distance covered or other factors, that there is no time for curriculum development. However, the question must be raised that if program specialists are not involved in these activities then who in the educational system has responsibiity for developing new and improved programs? The perceptions of other school personnel that program specialists do not provide enough staff development, suggests that more attention needs to be paid to this area in the program specialists' functioning. However, if program specialists are to be leaders in curriculum and staff development for the schools, then more training and time must be made available for these activities. Current training requirements do not include any background in program or curriculum development or staff development and thus it is not surprising that many individuals do not carry out these functions.

Coordination is another area in which there is much variability in functioning. The specialists have a broad view of programs and resources available throughout the SESR because they are responsible for serving a number of school sites. However, many feel they cannot effectively coordinate across these sites because they do not have authority to commit resources and have so many assignments they cannot monitor activities of personnel involved at any one site.

Variability in perceived functioning of program specialists should not be viewed as a violation of the intended role; rather, each variation should be evaluated for its effectiveness in meeting unique local needs. To assure that high quality and not just compliance oriented programs are implemented, the designation of program specialist's role and responsibilities should continue to be made as part of the local comprehensive plan and not through law.

Recommendation

1.1 The state department should provide general guidelines to SESRs concerning options in functioning of the program specialist role. Because of the diversity of SESRs throughout the state related to variations in demographic variables, in available personnel, and in stage of Master Plan implementation, local needs should serve as the planning base for defining the appropriate functions and activities of the specialists in each SESR.

QUESTION 2.0: ARE THE INTENDED RECIPIENTS BEING SERVED?

Education Code section 56368 clearly specifies resource specialists, DIS instructors, and special class teachers as primary recipients of the services of program specialists. By both the specialists' own report and perceptions of other school personnel, these personnel are in fact being served. However, there are discrepancies in the perceived frequency of contact. In all SESRs visited, program specialists were not available on a daily basis and over half of the other school personnel responding to questionnaires indicated they never or rarely saw program specialists. In contrast, the majority of the program specialists reported frequent to daily contact with all school personnel other than coordinators of non-special education programs, regular class teachers, and community agencies. Specifically, the majority reported they have frequent to daily contact with special class teachers, resource specialists, and DIS instructors--those individuals they are required to observe, consult with, assist, and in many cases, those they supervise. In addition, program specialists say they spend a significant amount of time interacting with parents, students, special education administrators, principals and school psychologists.

The coordinating, consulting, and assisting responsibilities require that program specialists interface with many individuals in the educational system. However, many school personnel do not know who the program specialist is or what he/she does. In part, the definition of whom is to be served by program specialists depends on a clearer delineation of the role and responsibilities; if the role is clearly supervisorial then primary responsibility must be to those for whom the specialist has direct responsibility. In the "general" specialist role the program specialist frequently is called upon to serve a much larger array of individuals, and the role begins to sound as if it can or should be all things to all people. If the specialists are to be effective, the scope of services they can provide must be clearly defined and realistic expectations of the type and frequency of services to be received should made available to other personnel with whom the specialists will have contact.

Recommendation

2.1 Definition of the program specialist role should include specification of the nature and extent of interaction that the specialist is expected to have with other school personnel and parents in the SESR. This definition of the population to be served should be determined by each SESR based on local needs and availability of other personnel resources.

QUESTION 3.0: HOW WELL PREPARED ARE PROGRAM SPECIALISTS TO PERFORM THE INTENDED ROLE?

Requirements for background and experience of the program specialist role are stated in Education Code section 56368. When asked about their prior experience and credentials, many program specialists did not provide any information. Based on those who did provide information, it appears that not all of the specialists possess the prerequisite credentials. In addition, while many specialists reported advanced training, much of it in special education, none of them reported any preparation in early childhood or career vocational development areas, even though half reported having some responsibility in these areas. While over half of the specialists reported major responsibility for coordination, consultation and/or program development for learning handicapped programs, only a third reported having credentials in this area. However, most of the specialists have several years of experience in education, much of it in special education.

In general, specialists reported that their training had come more from job related experience than formal training in specific areas. First year staff development activities were viewed as particularly valuable by the specialists interviewed. Program specialists believe they are very skilled in most areas of their job functioning. Given the diversity of requirements for functioning, three fourths of the program specialists do not think a special credential is a good idea.

It seems that other than the special education credential, many requirements for program specialists are not particularly germane to their job. For example, while in some SESRs program specialists do assessments, this was not reported to be a high frequency activity for the majority of the sample; thus operationally the school psychologist authorization may not be a useful prerequisite. Likewise, very few individuals reported involvement in activities for which a clinical services credential, or a health services credential prepares them. Advanced training and related experience and an indepth knowledge in one or more areas of major handicapping conditions are relevant preparation, allowing the specialist to provide specific expertise in that area if the SESR is organized around such specialization, and not geography. However, there is no requirement for training in curriculum and program development or in staff development and yet these are requirements for functioning. As previously mentioned, the lack of training in these areas may be a partial reason why many individuals do not engage in these activities. In addition, there is no requirement for supervisory or administrative training and yet many specialists function in this capacity.

One issue which emerged from the data is the lack of training of program specialists (as well as other school personnel) to facilitate communication with a growing non-English speaking population of individuals with exceptional needs. Many school personnel acknowledged that potential LEP/NEP handicapped students are not referred for special education because it is not felt that they will be provided with appropriate services. Given that only a small percentage of specialists are bilingual, it is indeed difficult to assure that effective services may be provided to these students.

Recommendation

3.1 Specifications for training and experience need to be more closely tied to actual needs for functioning of specialists. Since there is no credential for program specialists, institutions of higher education cannot provide specific training opportunities, but specialized staff development programs could be prepared for statewide dissemination, perhaps using the State Department's Special Education Resources Network (SERN), emphasizing the skills which program specialists must be able to demonstrate in order to function effectively in each local SESR.

3.2 The state department should provide guidelines concerning the competencies required for different modes of functioning (e.g., instructional, administrative, or support). Local option in preparation required should be exercised in each SESR depending on its' needs for program specialists functioning.

QUESTION 4.0: HOW IS THE PROGRAM SPECIALIST ROLE PERCEIVED TO RELATE TO OTHER PROFESSIONAL ROLES IN THE EDUCATIONAL SYSTEM?

Program specialists believe their role and responsibilities are distinctly different from all school personnel except special education administrators. A majority of the specialists believe there is overlap and conflict with the role and responsibilities of special education administrators. To a lesser extent the specialists see overlap and conflict with school psychologists. Other school personnel confirm these perceptions but also see overlap and conflict between the program specialists and resource specialists role, and in interviews, principals were cited as another group with whom program specialists often clash.

Often the tensions surrounding interactions with principals and other personnel relate to perceived comparable status, either through salary or administrative hierarchy. Other personnel cite lack of time on site or knowledge about an individual child as reasons for conflict with program specialists who are influencing decision making that site personnel must implement. While it is likely that some overlap and conflict exists because program specialists are now performing functions perviously assumed by others (e.g., the school psychologist in some cases), the specialists themselves speak of the frustration of limitations imposed by a structure in which they (the specialists) have the responsibility but not the authority to carry out requirements. Since the program specialist is perceived on many school sites as representing the county, SESR, or district special education administration, this lends credence to an assumption that they therefore have authority. However, even those program specialists who do function in a supervisory mode frequently do not have real authority and feel impotent to act without administrative approval. They point out that the cooperation of the principal and the superintendent is crucial for them to have an impact.

Recommendation

4.1 The roles and responsiblities of program specialists and other school personnel should be clearly defined in the local comprehensive plan. Designation of specific responsibilities for each participant in the educational process will reduce overlap and duplication.

QUESTION 5.0: WHAT SPECIFIC ORGANIZATIONAL, PERSONAL, OR ROLE DEMOGRAPHIC VARIABLES INFLUENCE PERCEIVED ROLE FUNCTIONING?

Several variables were examined for their possible influence on the perceived role functioning of program specialists. These variables included: number of years experience, grade level served, supervisory responsibility, type of salary schedule, and number of years the SESR has been functioning under the Master Plan. Having previous experience in the role seemed only to relate to the extent of overall responsibility for case management. In considering grade level served, specialists at a secondary level have no more responsibility for career vocational development than those serving other levels of the system, and those serving preschool programs have no more responsibility for these programs than others.

As previously discussed, a major issue which has been cited concerning the functioning of program specialists is "whether they should be seen as part of the instructional staff or in a supervisorial role" (CSDE, 1980). Data for specialists hired under teaching and administrative salary schedules and those having supervisory or no supervisory responsibility were analyzed separately to ascertain if there were any differences in functioning. Having supervisory responsibility, per se, did not seem to account for any real differences in functioning. Some of the specialists on administrative salary do not have any supervisory responsibility. In fact, a larger percentage of specialists who supervised others were functioning on a teaching salary schedule.

Many aspects of functioning seem to correspond to expectations given the salary type. For example, a larger percentage of "administrative" program specialists felt they had responsibility for the overall management of a student's case throughout the process of referral, assessment, planning and placement, implementation, and review, while "teaching" program specialists felt more responsibility for specific programs such as the learning handicapped, communicatively handicapped, severely handicapped, and physically handicapped programs. "Administrative" program specialists perceived more role overlap with principals and special education administrators, but it was specialists who had no supervisory responsibility, and those functioning under teaching salaries that perceived the most conflict with special education administrators. These "teaching" specialists complained of responsibility with no authority. Specialists functioning under teaching salaries perceived more overlap and conflict with resource specialists and special class teachers and psychologists. These role perceptions highlight the difficulties in the shared responsibility for different aspects of case management. There are no reported differences in prior experience or training of specialists functioning in either category; that is, neither has more administrative nor teaching experience.

In general, it seems that functioning in an administrative rather than a support role is uncomfortable to many specialists who feel they are experts in curriculum, not administration--and it is difficult to perform a dual role. They indicate a lack of preparation and skill in the area of techniques for assessing teacher effectiveness--a requirement for supervising and evaluating. Many of them called for a reduction or removal of the supervisory or evaluative function from the job description. Program specialists seem to accurately perceive that they are "outsiders" when they visit a site and must work to overcome this perception of other school personnel by providing services to the instructional and administrative staff that are useful and non-intrusive. When they must wear two hats (consulting or coordinating and supervising or evaluating), they find they are not as effective. On the other hand, some specialists complain that without the supervisory responsibility, there is no "clout" to the recommendations they make to either resource specialists or special class teachers. Some specialists argued that having "people skills" was the major factor in allowing them to overcome the "dual role" problem.

Another confounding variable is the apparent need in the early years of implementation of the Master Plan for program specialists to play a compliance/monitoring role; which may lead to tensions and conflict. In Master Plan SESRs that had been through the early implementation phase and were now having specialists function either by geographic area or area of specialization, the specialists were more satisfied and others perceived them more positively. Thus it may be an evolutionary process, in which the role must be clearly defined initially as working to assure proper implementation (but not in a punitive way); through providing information, consultation, and feedback on compliance issues. However, program specialists ultimately need to be able to remove themselves enough to become involved in program development activities toward improving the quality of programs.

Recommendation

5.1 The designation of program specialists as instructional, administrative, or support personnel should be an SESR decision. This decision should be based on the perceived needs and/or job requirements in the particular SESR given the stage of Master Plan implementation and other local variables. However, the specialists should be clearly designated either as administrative personnel, with authority to carry out required activities or as a consultant/coordinator who must clear actions with an administrative supervisor. If the specialists are to function as support personnel, then they must have the proper training and skills in curriculum and program development to effectively assist in implementing quality programs in the schools they serve.

QUESTION 6.0: HOW EFFECTIVE IS THE PERCEIVED FUNCTIONING OF PROGRAM SPECIALISTS?

Program specialists perceive themselves to be very effective in providing services to many individuals. They see themselves as most effective with special class teachers, resource specialists, handicapped students, and parents. School personnel also view program specialists as being most effective with resource specialists, special class teachers and handicapped students. Both groups agreed they are less effective with DIS personnel and least effective with regular class teachers. The majority of the school personnel who responded to questionnaires indicated they felt the program specialists were effective in carrying out their responsibilities, and were personally satisfied with the services they received. Criticisms focused on the efficiency of services, and on insufficient time spent in providing inservice or in evaluating program effectiveness for handicapped children. Interview respondents voiced more discrepancy in their overall evaluation of program specialists, many indicating they did not know what the specialists do and therefore feel they are unnecessary. It may be that questionnaire respondents were more positive in general because those who were unfamiliar with the work of program specialists could indicate a "don't know" response to questions rather than giving an uninformed opinion.

Recommendation

6.1 It seems that in general, the program specialists are seen as an asset to the overall special education program. However, role clarification is necessary, in order for them to maximize effectiveness.

QUESTION 7.0: WHAT PROBLEMS ARE PERCEIVED AS IMPEDING EFFECTIVE ROLE FUNCTIONING OF PROGRAM SPECIALISTS?

According to questionnaire data, a majority of program specialists are satisfied with their work. Program specialists interviewed were not as positive; many felt conflicting role responsibilities prevented them from doing a good job, and were frustrated by having to balance all their responsibilities. Some problems noted by both questionnaire and interview respondents included lack of time, too large of a caseload, and lack of authority. Related to the first two problems is the large distance between sites that many specialists must cover; travel time reduces actual service time in any one location. Also related to this problem is the number of sites to which any one specialist must travel. This means knowing and effectively interacting with individuals with a diversity of personalities, and approaches. The lack of time on any one site leads to a perception of the specialist as an outsider. About a third of other school personnel agreed that program specialists do not have enough time and have too large of a caseload, but they did not see lack of authority as a problem.

Given that lack of time, distance, and size of caseload were cited as the predominant perceived barriers to program specialists effective functioning, the passage of SB 769 which increases the program specialist/student ratio from 560 to 850 is likely to decrease the effectiveness of the program specialists ability to adequately provide needed services. If such a ratio continues to be the standard then the definition of the role and responsibilities must also be changed, because it seems unlikely that specialists can improve their services in the required areas while adding new responsibilities at the same time.

Recommendation

7.1 Two options should be considered by the legislature and state department. If the program specialist/student ratio required in SB 769 remains in force then the defined role responsibilities should be reduced. If all the role functions defined in law are to be maintained as responsibilities of program specialists then the specialist/student ratio or area of responsibility should be reduced.

QUESTION 8.0: WHAT CHANGES IN THE PROGRAM SPECIALIST ROLE AND RESPONSIBILITIES ARE NEEDED TO INCREASE EFFECTIVENESS?

Nearly half of the program specialists believe changes need to be made in the program specialist role. Again, the theme of increased authority emerged as the area of greatest concern to the specialists. Another suggested change included more time for curriculum and program development. The specialists would like to spend more time with regular teachers, primarily defining specific activities to include more consultation with teachers regarding new and innovative methods, approaches, and materials, and more coordination of the curricular resources required for successful IEP implementation. They believe they should be providing more staff development activities, but acknowledged that there is not enough time to do everything. They would like to have a better definition of responsibilities suggesting they could be more effective if there were "greater depth" in specific responsibilities rather than being spread so thin.

While many program specialists recognized the importance of research activities within the SESR and indicated they believe they should be more involved, others were relieved that this component of the role of program specialists was removed by SB 1870.

It seems that the expectations for functioning for many program specialists are not clear, or are confused, resulting in the specialists' perceptions of an idealized role that is not compatible with the overall definition of their responsibilities. For example, the role of the program specialist in instruction is currently defined in law in terms of support services and not in terms of working directly with students. Although many program specialists indicated they believe they should increase the time spent in consultation with teachers, they also indicated they should be spending more time in direct instruction. However, from interview data (both the specialists' own perceptions and perceptions of others) it seems that program specialists value the flexibility of not working directly with students--they like working with adults in problem solving tasks. In desiring to spend more time in instruction they are perhaps seeking the credibility and rewards of the educational system which are associated with "hands on" interactions with students. Many of the program specialists see themselves as neither instructional nor administrative, and therefore lack focus for their activities and interactions with others. While the specialists do express desires for certain specifics such as the reduction in routine activities and paperwork, as a group, they are most concerned with defining responsibilities clearly for themselves and for others so that they have a legitimate role in the special education system.

Recommendation

8.1 The state should provide guidelines for each SESR to follow in conducting a needs assessment of its' service requirements. The delineation of the role and responsibilities for program specialists in each SESR could then be based on this needs assessment.

Resource Specialists

In general, resource specialists are perceived as effectively carrying out the intended functions and activities of the role. While there was some local variation in the manner in which specialists carried out the requirements of the role, there was uniformity in the major functions performed in all SESRs. The specialists are viewed as instructional personnel who provide supportive coordination and assistance to other personnel, primarily in activities related to handicapped students. The number of requirements for effective role functioning is large and not all specialists carried out all activities. However, they were usually perceived as responding to the needs that existed at the site and in the district in the specific SESR in which they worked. The current climate statewide of cutbacks and reduction in assistance for special education raises questions concerning the feasibility of specialists assuming all the functions designated in the law and Commission on Teacher Preparation and Licensing competency requirements. Decisions need to be made as to whether resource specialists should function primarily as instructors or coordinators, or whether there is some specified "mix" that optimizes their services. Resource specialists functioning may well depend on the nature of the student population and site management, as clearly evidenced in the interview data. Thus, guidelines need to be provided for alternative patterns of utilization of these essential special education personnel at district and site levels. Specific issues which have been identified as important in determining the nature and scope of functioning for resource specialists will be presented in the following summary of the questions of the study.

Question 1.0: DO PERCEIVED ACTIVITIES AND FUNCTIONS OF RESOURCE SPECIALISTS MATCH INTENDED ACTIVITIES AND FUNCTIONS?

Education Code Section 56362 describes the resource specialist role. The Commission for Teacher Preparation and Licensing has further operationalized the role by detailing competencies related to the following functions: consulting, coordination, implementation/compliance, staff development, parent education, and instruction. For the present study, specific activities were identified and categorized both according to the entire process of service delivery (referral, assessment, instructional planning and placement, instruction, and review) and to the aforementioned functions. These two classifications provide the bases for comparison of intended and perceived role functioning.

The majority of resource specialists perceive themselves as being case managers; that is, they have major to full responsibility for following a student's case from referral through review. This typically involves coordinating the processing of a case as well as being involved in assessment, IEP writing, and in instruction. Data on the perceptions of resource specialists and other school personnel suggest that assessment, instructional planning, and instruction are the areas in which resource specialists have the most direct responsibility. In addition, school personnel view resource specialists as having major responsibility for student review. Involvement in referral and placement decisions is usually seen as coordinative, not as a direct responsibility. Unlike many program specialists, resource specialists do not view their participation as being in a child advocacy role.

Pertaining to the functions described for resource specialists, coordination and instruction are the major functions performed. While the other functions are carried out to some degree by the majority of specialists, staff development is the function on which specialists spend the least amount of time.

In carrying out their responsibilities as required by law, perceptions of specialists themselves and of other school personnel are consistent in viewing the "intended" role as being performed in most areas. There are, however, several variations from intended functioning. One exception is related to career and vocational development activities. Two-thirds of the specialists rarely or never engage in development of vocational and/or prevocational plans, but nearly half of them feel they should be involved in this activity. However, less than a quarter of the sample serve secondary programs, so this discrepancy in functioning cannot really be evaluated in terms of a violation of intended role functioning.

A second area in which the specialists "perceived" functioning differs from "intended" is in assessment. Neither Education Code requirements nor CTPL competencies specify direct involvement in assessment as a major component of the resource specialist role. However, nearly all resource specialists reported spending a significant amount of time conducting formal and/or informal assessments as well as coordinating the assessments of other professionals, thus it is in fact a major part of the operational resource specialist role.

A final area of difference in "intended" and "perceived" functioning is in staff development. While most resource specialists reported providing ongoing information and assistance to other professionals which could be classified as informal staff development, very few specialists in either the questionnaire or interview sample reported actually conducting or coordinating formal staff development activities more than once or twice a year.

Recommendations

1.1 The assessment function should be legitimized as part of the definition of the resource specialist role. These specialists, with a background in both regular and special education have a real understanding of how handicapped students differ from their non-handicapped peers, and provide both informal and formal academic assessments which are useful for instructional planning.

1.2 The staff development function needs to be more clearly defined. The informal provision of information and materials to other professionals is an integral part of resource specialists functioning. However, given the nature and extent of their other responsibilities (particularly instruction and coordination), the planning and carrying out of formal staff development activities is perhaps better defined as a primary function for personnel with direct responsibility for program development/innovation activities such as the program specialists.

Question 2.0 ARE THE INTENDED RECIPIENTS BEING SERVED?

Education Code section 56363 identifies individuals with exceptional needs, their parents, and regular staff members as the recipients of services of resource specialists. The average caseload of students is to be 24 pupils, and no specialist is to have a caseload exceeding 28 pupils. By the specialists own report and the perceptions of other school personnel, these individuals are indeed being served. The majority of the specialists have frequent, if not daily, contact with students, parents, and regular class teachers and principals as well as other school personnel. For the majority of the specialists, their caseload does not exceed the legal limit. However, some of the specialists do work with more than 28 students; frequently these students are not reported as offical cases. In some cases, specialists serve several sites on a part-time basis, and an aide is responsible when the resource specialists are not there. Many specialists feel this not only decreases instructional time with individual students, but increases their workload, because they are always having to "catch up" on what went on at any one site while they were at another site.

The resource specialist clearly has contact with, and is known by, a variety of school personnel. Contact with parents and regular teachers is seen as essential in assuring a smooth and effective planning process for handicapped children. Regular teachers indicated that when they don't have sufficient contact with resource specialists during planning and instruction, they don't know "who should be teaching what". However, when the specialists spend enough time with regular teachers these teachers feel much more comfortable with integrating the handicapped student into their classrooms. Contact with handicapped students is viewed as very appropriate. However, many specialists reported they felt that if the caseload were reduced they could do a better job, implying that the multiple requirements of the role (coordinating, consulting, etc.) reduce direct instructional time so that they cannot effectively serve as many students.

Recommendation

2.1 Each SESR should monitor its resource specialist program to assure that specialists are not exceeding maximum number of students served. Given the nature of other responsibilities, increasing the number of students being served by any one resource specialist will likely impair effectiveness of the program unless highly qualified aides or other alternatives are available.

Question 3.0 HOW WELL PREPARED ARE RESOURCE SPECIALISTS TO PERFORM THE INTENDED ROLE?

A statement of the background and experience required for the resource specialist role is given in Education Code section 56362. Resource specialists must be credentialed special education teachers who have had three or more years of regular and special education teaching experience, and must demonstrate the competenices established by the Commission for Teacher Preparation and Licensing. At the time of data collection for the present study, the CTPL competency regulations were not finally approved so no information is available on the number of resource specialists then practicing who would currently meet the competency requirements. However, the majority of the specialists do have the requisite background credentials and experience. When asked about the requirements for the resource specialist certificate of competence, roughly a third of the specialists agreed, disagreed, and were unaware of the new requirements for this certificate.

In general, specialists are well trained, both as seen by themselves, and as perceived by those with whom they work. Specialists reported that they had received formal training pertaining to the skills required for the job. Job related experience added to their knowledge in all areas. A majority of specialists felt very skilled as a result of training and experience. Exceptions were in 1) assessing social needs of handicapped students, 2) socially integrating students into the classroom, 3) test development, 4) coordinating resources and services, and 5) working with other educational personnel in providing special education services. Areas of training which were stressed by specialists as necessary for new resource specialists included assessment and diagnosis, public relations and counseling, and time management/organizational skills. Most specialists felt that teaching experience, particularly regular teaching experience, enabled them to understand the dynamics of both regular and special education programs. Additionally, if specialists are to play a role in vocational pre-vocational planning for special education students, they need to have specific training in this area, which is currently minimal.

One notable lack in preparation and skill of resource specialists (as well as most other school personnel) is in the area serving the limited English proficient/non-English proficient (LEP/NEP) population. As mentioned by some personnel interviewed, many times LEP/NEP children with suspected special education problems are not even referred because it is not felt that special education personnel can effectively serve these individuals. While this is more a problem to be addressed by the entire special education system, not just resource specialists, attention needs to be paid to ensuring that those individuals (namely resource specialists and special day class teachers) who provide the day to day instructional contact with these children can do so in a way that assures them appropriate educational opportunities.

Recommendations

3.1 The state department should sponsor the development of inservice workshops specifically dealing with the topics of 1) the needs of the LEP/NEP handicapped, and 2) conducting vocational/prevocational assessment and planning. These workshops should be made available to resource specialists already practicing throughout the state, perhaps using the existing Special Education Resources Network (SERN).

3.2 If assessment is to be a major function of resource specialists activities (as it appears it is) then preservice programs should assure that training is provided in this area (specifically related to test development and use of social assessment procedures). Additionally, training in time management/organizational skills, as well as organizing and conducting staff development activities, needs to be stressed in preservice training programs.

Question 4.0 HOW IS THE RESOURCE SPECIALIST ROLE PERCEIVED TO RELATE TO OTHER PROFESSIONAL ROLES IN THE EDUCATIONAL SYSTEM?

By both the specialists own report and perceptions of other school personnel, resource specialists are viewed as having distinctly different responsibilities from administrators, but as having overlapping responsibilities with school psychologists, regular class teachers, special class teachers, and DIS personnel. Some role conflict is perceived to exist with regular class teachers and with psychologists.

Since resource specialists are seen as instructional personnel it is not surprising that there is perceived overlap in responsibilities with other instructional personnel. Conflict occurs with regular class teachers when there is lack of clarity as to the nature and extent of instructional responsibility that each teacher has for students who are in regular classrooms for the majority of the day but are also assigned to the resource specialist program. Often the regular class teacher wants the handicapped student to complete assignments given in his/her class and views the resource specialist as a sort of "tutor" to assist the student in completion of assignments. The resource specialist, alternatively, views his/her role as remediating a general problem and wants to use his/her own curriculum strategies in working with the student. Regular class teachers and resource specialists must work together to determine the extent to which instructional strategies and activities can be coordinated between regular class and the resource specialist program.

The perception of overlap and conflict between resource specialists and psychologists is indicative of the fact that while assessment is not specifically designated as a role responsibility for resource specialists, they clearly do conduct as well as coordinate assessment activities. The assessments conducted by resource specialists are mostly academic in nature, in contrast to more specialized testing done by psychologists and other assessment personnel. However, the delineation of who should appropriately conduct different assessment and diagnosis procedures is not clear.

Recommendations

4.1 Each SESR should establish procedures to ensure that the nature of instructional responsibility for students assigned to both resource specialist and regular education programs is clearly delineated among the personnel who will work with each student.

4.2 The state department should provide guidelines which can be used by each SESR in determining appropriate personnel to conduct various assessment activities. The extent to which resource specialists are to be involved in assessment must be clarified so that training programs can address these skills.

Question 5.0 WHAT SPECIFIC ORGANIZATIONAL, PERSONAL, OR ROLE DEMOGRAPHIC VARIABLES INFLUENCE PERCEIVED ROLE FUNCTIONING?

Number of years of experience in the role and grade level served were analyzed in comparison to other questionnaire responses of resource specialists to determine the extent to which these variables may affect perceived role functioning. In general, while specialists with more experience felt more comfortable in the role, the number of years experience made no difference in perceived role performance. A few specialists reported that the first year on the job they were confused and frustrated. However, most specialists indicated that they knew what was expected of them in this role, and having more experience served to provide them with a clearer understanding of areas in which they would like to expand their functioning and skills.

Basically, specialists function in a similar manner at different levels of the educational system. Some differences were noted, however, according to the grade level served. Elementary level specialists reported spending more time consulting with regular class teachers than did secondary specialists. Elementary specialists also spend more time on assessment and staff development than their counterparts at the secondary level. Elementary level specialists reported more non-instructional duties than secondary specialists, but secondary specialists reported slightly more time spent in actual instruction. There are some unique characteristics of the secondary level, such as the larger number of regular class teachers with whom a resource specialist must interact to plan and coordinate a pupil's instructional program. On the positive side, it may be the case that at the secondary level a reduction in the number of assigned non-instructional duties leaves the specialist with more time for actual instruction. No differences were reported between the two groups in terms of caseload or in their feelings of overall responsibility for the management of a student's case. In general, the level in which specialists work did not make a difference in terms of job satisfaction or perceived effectiveness in providing services to others. However, at the secondary level more overlap and conflict in role responsibilities were noted between resource specialists and both special class teachers and special education administrators. These statements about differences in functioning at the secondary level must be interpreted cautiously, however, since less than one-fourth of respondents reported that they work at this level of the educational system.

Recommendations

5.1 The state department should undertake an analysis of differences in functioning of resource specialists at elementary and secondary levels. Requirements for effective functioning may vary at these different levels of the educational system.

Question 6.0 HOW EFFECTIVE IS THE PERCEIVED FUNCTIONING OF RESOURCE SPECIALISTS?

The majority of resource specialists perceive themselves as quite to extremely effective in providing services to students, parents, and school personnel. Interview respondents indicated that their ability to identify a student's learning needs and to match these needs with appropriate instructional methods was one of their greatest strengths. In addition, they believe that they are effective in insuring a continuity in the organization and processing of a student's case from referral, through planning, placement, instruction, and review. The specialists also feel that they are a useful resource to the regular staff, acting in a consulting and assisting role to assure coordination of the overall program for each student.

The resource specialist program is viewed by most other school personnel as an extremely effective special education intervention, particularly in the areas of assessment, instructional planning, and instruction. Questionnaire respondents and individuals who were interviewed reported being personally satisfied with resource specialists services. Regular teachers reported receiving assistance on how to work with the handicapped student in the class; many of them suggested that the resource specialist is the only special education representative who has been able to provide this kind of assistance. Psychologists, program specialists and even principals are often viewed as providing advice that is too theoretical or non-practical. The success of this program seems largely related to the fact the resource specialists are instructional personnel who can reassure the regular class teacher that they do understand the demands of the regular classroom, since they have both regular and special education teaching experience. Establishment and maintenance of this kind of rapport and working relationship takes time and contact. Whatever demands are placed on the resource specialist program in the future, time must still be maintained for the resource specialist to preserve this important link as a liaison between the regular and special education programs.

Criticism of either the resource specialist program in general or specific specialists was slight. One problem that was noted by other school personnel related to scheduling; pulling students out of the regular class to go to the resource specialist often meant that a student would miss important instruction in the regular class. Pull out programs require diplomacy and skill in coordination, particularly in meeting scheduling needs.

Recommendation

6.1 Each SESR should establish procedures to assure that part of the IEP team responsibilities include agreement among instructional personnel as to the scheduling of time for students to spend out of the regular class and in the resource specialist program.

Question 7.0 WHAT PROBLEMS ARE PERCEIVED AS IMPEDING EFFECTIVE ROLE FUNCTIONING OF RESOURCE SPECIALISTS?

The majority of specialists reported being quite to extremely satisfied with their work, and this job satisfaction seems to be sustained over time. There are frustrations, however. Specifically, the majority of resource specialists believe that lack of time and the size of their caseload impair their effective fulfillment of job requirements. Other school personnel agreed with the perceptions of resource specialists, and particularly felt that caseload should be reduced. Paperwork requirements were viewed by most personnel as excessive and as contributing to the reduced time available for carrying out critical job responsibilities such as direct instruction.

Given the passage of SB 769 which reduces the number of aides available to assist in the resource specialist program, the problems mentioned above are likely to be exacerbated. It is unclear what is a reasonable amount of time to spend on any one aspect of job functioning or what is an appropriate number of students that can be handled; obviously these relate to a number of situational variables (e.g., size of school, nature of student population, other resources available, experience functioning under a Master Plan system), as well as task variables. However, if the resource specialist program is to continue to function effectively (as it currently is, according to the perception of the specialists themselves and other school personnel affiliated with the program) then resources cannot be removed from the program.

Recommendation

7.1 The state department should undertake an analysis of the feasibility of the current requirements for functioning of resource specialists in differing local situations. Determination must be made of the appropriate mix of coordinative and instructional responsibilities for resource specialists given local variations such as geographic concentration or dispersion of students, availability of other resources (e.g., aides), and use of other special education personnel (e.g., program specialists as administrative or support personnel). The appropriate number of students that can be served by any one specialist should be weighed against other requirements for functioning and guidelines provided to SESRs with differing local needs and service delivery systems.

Question 8.0 WHAT CHANGES IN THE RESOURCE SPECIALIST ROLE AND RESPONSIBILITIES ARE NEEDED TO INCREASE EFFECTIVENESS?

Nearly three-fourths of the resource specialists felt that changes in the role and responsibilities would be beneficial. Again, the suggested changes focused on less paperwork and smaller caseloads. In addition, the specialists would like more time for instruction and curriculum development.

Specialists believed that responsibilities need to be clearly defined, emphasizing some aspects of the job more than others. The specialists' perceptions of areas in which they would ideally spend more time primarily include: 1) consulting with regular classroom teachers on the identification and assessment of learning and behavioral patterns of handicapped students, 2) working with teachers in utilization of evaluation data for modification of instruction and curriculum, 3) assisting in the selection of instructional methods and materials, and 4) in general, coordinating the implementation of the activities of the resource specialist program with the regular classroom curriculum. Many of the specialists would like to spend more time working one to one with students, and believed they should monitor the progress of those who have left the resource specialist program. They feel they should be spending more time in the development of vocational plans for handicapped students. Nearly half of the specialists would like to spend more time providing both formal and informal staff development as well as participating in innovative program development activities. They would like to have more contact with community agencies offering other services and with other resource specialists, perhaps for professional development. They feel that they should spend more time with parents assisting them in understanding the program being provided to their child and in providing information regarding more effective utilization of other community resources besides the school.

In short, the specialists would like to be doing all the activities and functions which are already defined as part of the resource specialist role, but realize that they need more time, fewer students, or some administrative direction in order to set priorities to carry out all these responsibilities. Many specialists suggested that hiring aides who were more highly skilled is a reasonable way to increase the overall effectiveness of the resource specialist program. Much time is spent in training and supervision of resource specialist aides. Better trained aides who have a long term commitment to the program (as opposed to college trainees, etc.) could assume more responsibility for the day-to-day functioning of the program (including paperwork requirements), thus freeing the resource specialist for the coordinative and consulting aspects of the role. However, the reduction of aides under SB 769 undermines the viability of this alternative.

In all cases where specialists worked at multiple sites there was a perceived reduction in effectiveness. If a specialist needs to serve more than one school then a reduction in the number served at any one site may be necessary to assure effectiveness of the program.

Recommendation

8.1 The state department should conduct an analysis of hiring practices for resource specialist aides. If reduction in the number of aides as required under SB 769 is to continue, then the skill level of those aides to be hired must be examined to assure that the resource specialist program will benefit from these aides without increasing the training and supervision responsibilities of the resource specialists who need to use this time carrying out other role responsibilities.

The findings of the present study add to the body of literature related to educational change. The goals of federal and state special education legislation in the past decade have focused on improving service delivery to handicapped children. Changes, such as the introduction of new personnel roles, have met with mixed success. The experience of California, under the Master Plan for Special Eudcation mirrors that of many other states (e.g., Texas and Massachusetts) in that the success of educational change has been found to vary, depending on the extent to which the innovation matches variations in local district needs and capabilities. In the case of the program and resource specialists who are the topic of the present study, to the extent that the requirements for functioning of the two roles have produced service delivery alternatives that assist other local personnel, the functioning is perceived as successful. Where requirements for functioning are seen as intrusive, or non-adaptive to local conditions, the change process has met with more resistance, producing either non-compliant implementation or negative perceptions among school personnel, or both. The task for policy makers, researchers and practitioners is to analyze the response of the "street level" bureaucrats, toward providing knowledge and understanding of the variations in functioning of program and resource specialists and other educational personnel, in diverse educational situations. Such knowledge can provide a basis for more realistic policy and program planning to enhance the viability of promoting successful changes in the educational system inherent in assuring free appropriate public education to all handicapped children.

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APPENDIX A

CASE STUDY SUMMARIES
OF RESOURCE AND PROGRAM
SPECIALISTS FUNCTIONING

(Ethnographic Data Pertaining
to Program Specialists
and Resource Specialists
Summarized by Special Education
Services Regions in California)

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #1

This SESR was chosen because it is a rural, county-wide SESR that has been under the Master Plan for four years and hires its program specialists under an administrative contract.

I. QUALIFICATIONS AND ASSIGNMENT

Of the two specialists interviewed, one resource specialist was reported as having the appropriate credentials. Although there was no information on the other resource specialist, this individual's interest in psycho-motor development and brain dysfunctions indicated some specialization. The first resource specialist had special education teaching experience for a year, and the other resource specialist had been a reading teacher for 12 years. Neither of these professionals had been regular classroom teachers.

There was no indication that the caseload of either of these resource specialists went beyond the acceptable legal range (24-28), the new resource specialist spoke of seeing up to "ten children beyond" the official caseload of 17. This resource specialist was unhappy with the additional assignment. The other resource specialist did not mention caseload as being an issue. Each resource specialist had an aide.

II. ACTIVITIES

Identification and Referral

In general, teachers make the original referral. At one site the principal instituted a pre-referral system to screen referrals before they had to be processed according to law. It appeared that a lot of "hitches" had been worked out, and this process gave teachers an opportunity to informally discuss what kind of problems a student was having and to work out remediation, if feasible, prior to a formal referral and subsequent assessment and placement.

One resource specialist plans and coordinates IEP team activities. The responsibilities assigned the other resource specialist involve contacting parents at least twice before an IEP meeting to discuss the procedures and inform parents of their rights in language they can understand. Initial contact was made by the teacher who originally referred the child.

Assessment

Assessment was perceived as both a formal procedure, and an informal ongoing process. Both resource specialists were responsible for administering academic tests as part of the IEP process. Although assessment cut into one of the specialist's time on instruction, this resource specialist disagreed with the principal who perceived the resource specialist role as divided. One person would carry out a "service delivery system," and another individual could function as a "coordinator and assessor," remarked the principal. The resource specialist believed criterion referenced testing was important for instruction and improving the design of the IEP. This person felt psychologists were the proper staff to perform norm referenced tests (for purposes of placement not instruction).

Instructional Planning

It was assumed that the resource specialist who coordinated the IEP process participated in the instructional planning of the IEP. Since this resource specialist argued in favor of assessment as a basis for instructional planning, there seems to be sufficient evidence that this was one of the responsibilities of this specialist.

The other resource specialist did not differentiate between the IEP and ongoing planning for classwork. This resource specialist said: "I do instructional planning for my children and keep a copy for parents, if there are any questions, and even the little ones know the plans."

Placement

Placement appeared to be a team decision made during an IEP meeting.

Instruction

A majority of resource specialist time was spent in direct instruction. One resource specialist focused primarily on academics. This resource specialist felt specialists have similar responsibilities, but may vary in the instructional aspect of their work according to their area of expertise. The other resource specialist provided both academic remediation and psycho-motor activities for special students. There was staff support at each of these schools for the work of the resource specialist, regardless of their specialty.

Student Review

One resource specialist spoke of "placement review" as part of the IEP process. The other resource specialist defined review as a continuous monitoring of student progress, as well as a formal requirement under law. One resource specialist reported that a formal review of student achievement occurred every six months.

Staff Development

Officially, staff development appeared to be an annual event at both sites visited. A principal with expertise in Special Education conducted an inservice at one of the schools observed, and a resource specialist presented a formal inservice in the other school visited.

Staff development was also perceived as an ongoing process of consulting with classroom teachers about resource students, suggesting instructional approaches, and/or providing materials which could benefit both special and regular students. Others interviewed concurred in this interpretation of the ongoing inservice function of resource specialists.

Parent Education

Although it is clear that "parent conferencing" was a function of the resource specialist role as perceived by both specialists interviewed, one resource specialist emphasized parent contact more consistently. This specialist's work with parents may be both a function of time on the job (one year versus the few months the other resource specialist held the position) and personal interest. This resource specialist called parents when it was warranted, and spoke of continual contact with them.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

Both resource specialists complained of a lack of time to accomplish what they perceived as their responsibilities, primarily instruction. One resource specialist was especially concerned about the extent to which referral procedures, especially assessments, cut into time for direct instruction. The other resource specialist was unhappy with the principal's decision to institute an academic program which cut back the amount of time students could spend in the resource program.

The newer specialist expressed dissatisfaction with the amount of paperwork and felt the role would be more effective if the caseload were smaller. This specialist also saw a need for on-site counseling, which would lessen demands on resource specialists in this area.

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #2

SESR #2 possesses the following characteristics: it is a consortium; it has been operating under the Master Plan for 4 years; and its program specialists are categorized as "other," since they perform a variety of functions.

I. QUALIFICATIONS AND ASSIGNMENT

Each of the five resource specialists interviewed in SESR #2 have taught full-time for three or more years. All but one possess at least one special education credential. One is currently working on an LH credential. None of the resource specialists have had regular classroom teaching experience.

All of the Resource Specialist Programs investigated in this area function as "pull-out" programs and are designed for students assigned to them for less than the majority of the school day. Caseloads range from 14 to 22 students.

II. ACTIVITIES

Identification and Referral

Referrals are received by the high school resource specialists directly from the student's counselor. The resource specialist has the responsibility of gathering information from a student's folder (e.g., grade reports) prior to the IEP Team meeting. At the meeting, which is attended by the vice-principal (or designee), referring teacher, program specialist and resource specialists, modifications are suggested and a case-carrier (usually one of the three resource specialists at the school) is assigned.

In another school (elementary level), referrals are given to the resource specialist via the principal. The principal and resource specialist consult with the referring teacher to determine the appropriateness of a particular referral (for testing) and/or might suggest modifications for the regular classroom.

In still another elementary school, the resource specialist as a member of the IEP Team, hears referrals from teachers, and together with the team recommends remediations for the classroom and/or initiates an assessment with the consent of the parents.

In none of the above mentioned cases is the resource specialist the primary recipient of referrals. The resource specialists function as consultants in this area.

Assessment

All resource specialists interviewed conduct academic assessments. Some also do sensory acuity, sensory-motor and aptitude testing. One resource specialist mentioned that, at times, a program specialist has been requested to do assessments. Psychologists and nurses were also mentioned by a few resource specialists as having some responsibily for assessments.

Instructional Planning

All resource specialists in this area develop their own instructional plans and choose their own curriculum materials. Most rely on the IEP team to establish the handicapping condition and the long-term goals for the student. From these long-term goals, the resource specialists formulate daily instructional plans.

One resource specialist coordinates instructional planning with the student's regular classroom teacher and is sometimes assisted by a program specialist.

Two high school resource specialists use folders containing records of each of the student's work-in-progress, plus grades they've received on each unit. One of these high school resource specialists sends progress checklists to the students' teachers and uses the information in planning instruction.

Placement

Four of the five resource specialists interviewed help make placement decisions with other school personnel as members of their schools' IEP teams. It is not known whether a fifth resource specialist who was interviewed has responsibility for making placement decisions.

Instruction

In all cases, instruction is the major activity for these resource specialist. Several of them instruct students both one-to-one and in small groups. One resource specialist instructs mostly on a one-to-one basis.

Aides, in four of the six cases, assist resource specialists in instruction. One resource specialist said that a program specialist also assists with instruction once a week. The resource specialist of the continuation high school said that the focus of instruction at this site is in getting students to pass the high school proficiency exams.

Student Review

All resource specialists review student progress. Four conduct annual, end-of-year reviews of each student. One assesses the students' progress every six weeks. In addition to the annual reviews, some resource specialists also maintain ongoing contact with parents as a means of checking progress, conduct formal mid-year reviews, and send periodic progress reports to regular class teachers.

Program Evaluation

One resource specialist stated that under the supervision of the program specialist, the procedures of the Resource Specialist Program (RSP) are reviewed for compliance. Another resource specialist said that a review of the RSP is ongoing. No information was obtained in regard to this subject from any of the remaining resource specialists in this area.

Staff Development

Three resource specialists make at least one formal in-service presentation to their staff each year. Two consult with teachers on a daily basis, but do not hold any formal in-services. It is not known whether one of the resource specialists interviewed does any staff development.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

Two resource specialists perceive themselves as most effective with students because of their ability to isolate a students' learning needs and to match these needs with appropriate instructional methods. One felt that because the IEPs were geared towards the child having every chance of success, the child's self-esteem was positively affected. Additional areas of effectiveness mentioned by resource specialists include: their teaching self-discipline, as well as improving math and reading skills; their expressing care and concern for students as individuals; and their helping students become better organized and more attentive.

Four resource specialists claim the amount of paperwork involved in their jobs is a major cause of inefficiency. Another related problem mentioned is the frequent change in forms. Other conditions which these resource specialists feel impede their effectiveness include: having too large a caseload; students who are truant; students who are reluctant to be identified with the resource specialist program; constantly changing laws; time limitations; newness to position; and being out of touch with what is called "normal" performance. Two high school resource specialists who work in the same program each reported that there were tensions between them. Different personalities and educational philosophies seem to undercut collegiality or cooperation in one high school.

When asked what changes each of them would like to see made in their present roles and in special education services in general, two said they would like to be able to spend more time directly working with teachers, helping them develop educational programs for students. One felt that if resource specialist aides were qualified to take more responsibility for instruction in the "pull-out" program, the resource specialist would be free to do this. Other changes which these resource specialists would like to see are the following: greater acceptance among regular staff members of individual differences; vocational education programs and physical education facilities; and more money for computers and audio-visual materials in order "to keep kids interested."

Resource specialists were asked three questions related to training: 1) What past experiences and training did you find most helpful to you in your present position? 2) What additional instruction would you like now that you are working as a resource specialist? and 3) What background experiences would you recommend to someone who is considering working as a resource specialist?

In response to the first question, two resource specialists said that their on-the-job experiences as teachers were most helpful to them. Two said their work experiences outside of education prepared them the most for helping students, because they understood the kinds of jobs their students would be seeking and the preparation they would need for them in school. Additional experiences and training which were noted that were helpful to these resource specialists were working as a RSP aide, being a parent, training in speech and language, and taking classes in assessment and psychology.

Now that they have worked as resource specialists, two said they would like more guidance in vocational education and vocational assessment. These resource specialists would also like more training in counseling, auditory dysfunctions, visual handicaps, and reading.

For anyone considering a position as a resource specialist, the following were recommended as important background experiences: skill in being able to use materials to help remedy learning handicaps, both regular and special education teaching experience, and "liking children."

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #3

SESR #3 possesses the following characteristics: it is a county-directed SESR in the Master Plan for three years. It has a rural/urban mix and its program specialists are under instructional contracts.

I. QUALIFICATIONS AND ASSIGNMENT

Two of the three resource specialists interviewed had appropriate special education credentials. One resource specialist had worked in a special day class but did not indicate any academic qualifications for this position aside from a standard elementary credential.

One resource specialist had worked at this site for three years, and had previously taught in a private special education school for emotionally disturbed adolescents. Another resource specialist, with five years experience in the same school, had worked with handicapped pre-school children for one year and had also substituted in special education classes and interned in a language clinic before coming to this site. The third specialist had worked in a special day class for 2½ years and had taught in an adult education program.

Two resource specialists interviewed worked full-time in a pull-out program, and one resource specialist worked part-time in the same type of program. The part-time specialist was assigned from 2-16 students. There is only caseload information about one full-time resource specialist, who was assigned 24 students. It is assumed that since all specialists operated within the same district, and two were in the same school, the caseload level was within legal limits.

II. ACTIVITIES

Identification and Referral

Two resource specialists were consulted by teachers, and occasionally by parents, about students in order to determine whether there was a need to go through the whole special education process, or if "alternative possibilities" were feasible. If there was a decision to follow through with formal procedures these specialists would do the academic testing. A third specialist reported being asked to do assessments, but was not consulted in the prereferral process.

Assessment

All the specialists interviewed performed academic assessment and the psychologist gave IQ or personality tests. Time on assessment was approximately 5½ hours per week according to the full-time resource specialist, and 3 hours per week for the part-time specialist.

Instructional Planning

Two resource specialists described instructional planning as one of the activities in meeting with an IEP team, when they took part in writing goals and objectives for a student. One specialist felt that instructional planning occurred after test results were reported. A third specialist did not provide information in this area.

Placement

Placement decisions were made during IEP meetings. None of the specialists reported having any special influence in this area.

Instruction

All the resource specialists interviewed spoke of spending over 50% of their time on direct instruction. Instruction took place in separate resource rooms and two specialists described instruction as following through on the IEP.

Student Review

This was done formally at both schools in an annual review which was preceded by assessment and involved members of the original IEP team. Student review was also reported as an "informal" ongoing process of evaluating student progress.

Program Review

This was generally defined as "student review." Program review was usually perceived as a review of pupil progress in terms of an "IEP" rather than an evaluation of ongoing teaching/learning practices.

Staff Development

One resource specialist participated in a formal presentation which oriented aides to their new responsibilities. None of the specialists spoke of staff development as an ongoing process. There appeared to be a lack of interest, or leadership, in perceiving teacher inservice as a function of the resource specialist role. One of the teachers interviewed addressed this gap and pointed out that with the addition of new staff (this was a growing district) there was a real need for some knowledge about the identification and referral process.

Parent Education

Only one resource specialist acknowledged any parent involvement. One of the regular classroom teachers reported that resource specialists had limited contact with parents from her experience with the resource specialist program. There was little emphasis on parent participation as significant to this role.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

This was a "growing" district, with a low SES population. The demographics influenced the functioning of the specialists and many of their comments and the remarks of others reflected perceptions of (a) a lack of qualified personnel, (b) a scarcity of resources, and (c) a lack of leadership in coordinating programs, either at the site, within the district, or from the SESR.

A resource specialist, who had a caseload of 24, spoke of working with 39 students the preceding year. This specialist shared materials with other schools and felt that this practice impeded efficient implementation of the program. A few teachers criticized the length of time it took to work through the referral process.

The principal and a few teachers were unhappy with the communication skills of one resource specialist, who had been hired apparently without the proper credentials.

Pull-out programs require diplomacy and skill in coordination. Two resource specialists interviewed agreed that "scheduling" was a problem. One teacher interviewed confirmed the difficulty one of the specialists had in communication, and this teacher felt the resource specialist was "inconsiderate," when scheduling students.

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #4

SESR #4 possesses the following characteristics: it is an urban area, and a Consortium with one year in the Master Plan. Program specialists are required to have a Pupil Services Credential.

I. QUALIFICATIONS AND ASSIGNMENT

Four resource specialists were interviewed, one was in an elementary school and three were in high schools. The elementary resource specialist had an M.A. in the education of the mentally retarded, and a California special education credential. This resource specialist had been a special education teacher for eight years, one year of that time had been spent in an EMR class.

Two of the high school specialists were credentialed according to law. A third resource specialist was working on an LH and Pupil Personnel credential. Two of the specialists had been single subject teachers for fifteen years or more. The other resource specialist had six years of experience in special education before accepting the present position.

The elementary resource specialist was assigned grades K-5, but there is no information on the caseload. In the high school, one resource specialist reported having a caseload of 24, but claimed contact with more students than officially assigned. Another resource specialist said there were 16 students in Level I and 22 in Level IV. Although this may seem high, Level IV students only came to resource twice a week. The third resource specialist indicated that officially all specialists working at this site were within the legal limit in their caseloads.

II. ACTIVITIES

Identification and Referral

The elementary resource specialist spent 2½ hours per week reviewing "referrals" as a member of the guidance committee. The guidance team was instituted as a pre-referral process.

None of the high school resource specialists appeared to play a role in the identification and referral process. Academic assessment seemed to be the primary function of resource specialists after a student had been referred.

Assessment

All the resource specialists interviewed performed academic assessments for placement and IEPs. The elementary resource specialist did academic testing, observed students and consulted with members of the guidance team as part of the "assessment" process. Two high school specialists administered the Wrat and the Brigance Inventory of Essential Skills. Part of their responsibility also included contacting regular classroom teachers as to student status. Another resource specialist administered assessments as part of a screening committee which reviewed referrals and handled transfers.

There was no information on whether this group functioned in the same manner as the guidance team. This specialist reported giving two tests in academic areas and two tests "in each handicapping area."

Instructional Planning

The elementary resource specialist described this function as "organizing material for the aide to use in a partial pull-out program, and feeding supplementary material to classroom teachers." Resource specialists in the high school do instructional planning when they write objectives for an IEP and in their preparation for the different levels of resource pupils. Level I students spend "up to 50%" of their time in resource classes and require the most preparation, while Level IV students are tutored, generally using their regular classroom assignments with occasional supplemental materials.

Placement

None of the resource specialists interviewed reported having any significant role in placement.

Instruction

Only the elementary resource specialist spent less than 50% of the time on instruction. This resource specialist works predominantly in the regular classroom (the aide performs most of the instruction with pull-out students), and may be as involved in "consulting and assisting regular teachers" and "modeling" instruction as with tutoring individuals or groups of students. This resource specialist found the "consultant role" one of the most satisfying aspects of the resource specialist program.

Two other resource specialists spent a majority of their time instructing special students in a subject or tutoring them in areas where they need remediation. Another resource specialist reported instruction was a major function, but did not specify what the nature of the work was.

Student Review

There was no information about a formal review process from the elementary resource specialist.

One resource specialist stated that a formal review was held in the spring, and Form B of the Brigance Inventory of Basic Skills was administered by one of resource specialists as a post-test. Another resource specialist initiated a six week review procedure. Classroom teachers received a checklist for each special student in their classes, and at the end of the six weeks they indicated what kind of progress these students had made. Both this resource specialist and a regular classroom teacher reported the checklist as an effective means of monitoring students receiving special help.

Staff Development

The elementary resource specialist provided some formal staff development on the functioning of the guidance team. None of the other resource specialists indicated they had participated in formal inservice programs, but all the specialists did assist and consult with "others" informally about special students.

The elementary resource specialist consulted with and assisted others on the guidance team and in the regular classroom. Teachers interviewed at this school indicated how their attitudes had changed and how this resource specialist helped them in instruction. The principal confirmed this specialist's role in providing continual "inservice," such as instructional modeling.

High school specialists maintained contact with regular classroom teachers and insured that the teachers were aware of special students and their problems.

Parent Education

There was no information on parent education. Contact with parents was not emphasized, and the only time it was mentioned was during a discussion about the "identification and referral process."

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

Two resource specialists perceived a continuing bias against special education by regular staff members. They felt labeling and "pigeon-holing" had not been eliminated. One of the specialists felt that special education was blamed because of constant legal/procedural changes, as well as changes in acceptable practices.

High school resource specialists complained about bureaucratic problems (lost files) and the number of teacher contacts (80 according to one resource specialist). Two of the specialists who had been single subject teachers were uncomfortable tutoring students outside their own area of expertise. One resource specialist was frustrated with Level I students (these are regular pupils who see the resource specialist daily) because they were performing so poorly. A special day class teacher and a DIS faculty member had similar concerns about these lower tract special students. The special education personnel felt students were not getting remediation, and resource specialists were no more than "glorified tutors."

The new resource specialist wanted more time, additional instruction in assessment, better knowledge of handicaps and increased counseling services. The changes the high school specialists were interested in were noted above, with the exception of one statement by a resource specialist about the impact of limited finances. Because of financial constraints the district had been hiring college students as aides, which this resource specialist felt had hurt the program. There was a lack of permanency and commitment on the part of these part-time aides.

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #5

SESR #5 represents the following characteristics: it is a single urban district, has been operating under the Master plan for two years, and its program specialists are hired on a management contract.

I. QUALIFICATIONS AND ASSIGNMENT

Both resource specialists interviewed are credentialed special education teachers. They both meet the legal guidelines requiring resource specialists to have three or more years of full-time special education and regular education teaching experience: one has had 20 years of combined teaching experience and the other has had seven years.

Each resource specialist is assisted by one aide. Both resource specialist programs function as "pull-out" programs (i.e., resource specialists are not assigned to the regular classroom), and are designed for students assigned to them for less than the majority of the school day.

II. ACTIVITIES

Identification and Referral

Both resource specialists are actively involved in the identification and referral stage. They receive all referrals of children who do not seem to be making appropriate progress, consult with all appropriate people (i.e., psychologist, nurse, parents, teachers, principal), and coordinate the entire referral process.

Assessment

Both resource specialists interviewed in this area conduct their own assessments (i.e., they administer achievement, academic and sensory-motor tests). They also take responsibility for coordinating the assessment work done by other specialists (e.g., psychologists, nurses, speech and hearing therapists). In one of the schools, the IEP Team determines which specialist will be responsible for testing and what tests will be administered.

Instructional Planning

Instructional planning is a role function of both resource specialists who were interviewed. In one case, the resource specialist helps teachers plan for children they have in their classes, in addition to developing instructional plans for children in the "pull-out" program.

Placement

One resource specialist helps make placement decisions for students as a member of the IEP Team. It is assumed, although not known for certain, that the second resource specialist has responsibilities in this area.

Instruction

These resource specialists spend the largest percentage of their work time giving instruction to students. Both are assisted by instructional aides.

Student Review

Both resource specialists conduct annual reviews of students assigned to the resource specialist program. In addition, one of them maintains ongoing telephone contact with the students' parents.

Staff Development

Both resource specialists provide staff development through their informal and ongoing consultation with teachers and by conducting formal in-services once or twice a year (e.g., on learning disabilities diagnosis, Master Plan procedures, and laws).

Parent Education

One resource specialist has frequent telephone contact with parents but did not mention doing any formal parent education. The other holds parent group meetings to discuss learning disabilities, Master Plan procedures, and special education laws.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

When asked the ways in which they felt they were most effective in their roles one said: "[in providing] the organization and coordination of all special education services for IWENs from the referral through to the review stage," and "as a resource to the staff on many aspects of learning handicaps." The other feels most effective giving direct instruction to students and helping parents understand their children's needs.

Conditions which were stated that impair their effectiveness as teachers include: not having enough time to do all the work; having too much paperwork for the Master Plan; and having to split teaching assignments between two schools. (This is the case of only one of the resource specialists.)

One resource specialist said bilingual teachers were reluctant in referring their students for consideration for the resource specialist program because of the perceived lack of exposure the students would have to their native language. "Proper assessment," [of bilingual students], according to this resource specialist "is [also] hard to do and it takes a long time to get someone in the district who can conduct the assessment."

In general, both resource specialists like their work. They each, however, recommend a few changes. One resource specialist recommends the resource specialist aide position be classified at a higher level than it is presently, because the job, it is felt, is more demanding than a regular aide's position and requires more competent personnel. The second resource specialist suggests that in order to optimize effectiveness, a full-time assignment at one school with an approximate caseload of 18 students would be much better than a split assignment. Several of the personnel at this school agreed that because of the unusual demands of the population they served, having a part-time resource specialist was insufficient.

Several school personnel think that the resource specialist/student ratio should take into consideration the social class/ethnic composition of the student population and other factors rather than relying solely on arbitrary numbers (24 per 1 caseload).

Case Study Summary of Resource Specialists Functioning

Special Education Services Region #6

SESR #6 represents the following characteristics: it is a single district with suburban and rural areas, has been operating under the Master Plan for three years, and its program specialists are hired under both Management contracts (those program specialists who supervise special programs: e.g., CH, PH, SH) or Pupil Services contracts--a teaching salary plus stipend (those who serve LH and resource specialist programs).

I. QUALIFICATIONS AND ASSIGNMENT

Each of the three elementary resource specialists who were interviewed possesses all of the credentials and experience necessary to satisfy legal requirements for their position: they are credentialed special education teachers and have had at least three years of full-time teaching experience (e.g., one has taught approximately five years, another seven years and another ten years) in regular and special education settings.

Each resource specialist is assisted by one aide who, among other duties, carries out instruction under the guidance of the resource specialist. The Resource Specialist Programs (RSP) are conducted as "pull-out" programs (i.e., the resource specialists do not work in the regular classrooms and the programs are designed for students assigned to them for less than the majority of the school days).

Two of the resource specialists work full-time in the elementary schools where they are assigned; the third works part-time in each of two different schools. It was reported that the caseload of one resource specialist was as high as 36 (with yet another four students currently in the assessment phase). The exact number of students the other two resource specialists were seeing was not determined in the interviews.

II. ACTIVITIES

Identification and Referral

Each resource specialist is the primary recipient of referrals at the school level. All mentioned that teachers are a source of referrals. One also mentioned that parents, counselors, administrators and community members make referrals to the resource specialist and that an IEP Team meeting is held for each referral made.

At another location, where two resource specialists were interviewed, it is the policy for the resource specialists to check the cumulative folders of children who were referred, talk to the appropriate teacher and consult with staff as to whether the case should be processed through the special education referral system. If the referral requires special education processing, it is the resource specialist's responsibility to inform parents and to get their consent to test.

Assessment

Academic assessments are carried out by each of the resource specialists interviewed. One includes observations as part of each assessment. At the time of the interview, none were coordinating the interpretation and implementation of educational and psychological findings.

Instructional Planning

All resource specialists are involved in instructional planning for handicapped students. All reported that in their schools, instructional planning occurs after placement decisions have been made. One resource specialist does the planning with parents. The other resource specialists participate in instructional planning with other members of their school's IEP team.

Placement

As members of their schools' IEP teams, all resource specialists interviewed help in making placement decisions.

Instruction

This is the major area of involvement for each of the three resource specialists interviewed. Fifty to 75 percent of their time is spent in instruction. All three Resource Specialist Programs are designed as "pull-out" programs and children are given instruction in both small groups and on a one-to-one basis. Two of the three resource specialists said that their aides assist them in instruction. It is not known whether the aide in the other program does this. None of the resource specialists interviewed played a role in coordinating special education services for handicapped students.

Review

Ongoing informal reviews of each student's progress are done by all resource specialists. In addition, one resource specialist conducts parent-student conferences every six to nine weeks and two conduct yearly formal reviews in order to assess students' progress.

Staff Development

All resource specialists reported that they provide some consultation to teachers regarding handicapped students. One does this mostly as "informal advice-giving" in the area of curriculum designing and in helping teachers formulate realistic goals for students with learning handicaps. Two of them (both at the same school) provide help to their staff by displaying information regarding the learning handicapped students on teachers' bulletin boards, and by making available to staff audio-taped lessons and books for use with children.

Program Development

None of the three resource specialists interviewed have any involvement in program development at their schools.

Program Review

Two resource specialists said they meet with their program specialists to review the Resource Specialist Program. One indicated that this is done informally on a weekly basis and also once a year on a formal basis. The other resource specialist reviews notetaking and report writing with the program specialist as an ongoing activity.

Parent Education

None of the resource specialists indicated that they conducted any formal parent education programs. All three resource specialists consult with parents of handicapped students at the referral, assessment, placement, and/or instructional planning stages. One mentioned having frequent conferences with parents to discuss their children's work. Another mentioned developing the IEP together with the parents. Although it was not specified, it is assumed that resource specialists are providing ongoing help and information to parents through this contact with them.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

Two resource specialists judge themselves as most effective when providing direct instruction. In addition, one of them feels that developing curriculum and consulting with teachers is another area of effectiveness. The third resource specialist is most effective in assessing the academic weaknesses of students, and yet, feels that too much time is spent doing assessment, cutting into instructional time. This resource specialist suggests that others should coordinate the referral process and conduct the assessment so that more of the resource specialists time can be spent giving direct instruction. Also recommended is lessening of the caseload. This resource specialist's caseload is currently 36.

In contrast, another feels that coordinating the "referral to review" process is a very important role, although it involves too much work considering the paperwork required. In this case, it is suggested that the caseload and paperwork be lessened so that the resource specialist's role as coordinator can be maintained. A recommended number of students is 20.

Another resource specialist, who divides a full-time appointment between two schools, feels that this arrangement inhibits effectiveness. Too much time, it is felt, is wasted catching up with events, etc. which have taken place while away. This same resource specialist wishes to be able to spend more time consulting with teachers about instruction, and feels it would be possible if instructional aides were better trained, needing less supervision and/or if psychometrists could do some of the testing which currently the resource specialist is doing.

Case Study Summary of Program Specialists Functioning

Special Education Services Regions #1 Through #6

I. QUALIFICATIONS AND ASSIGNMENT

Of the six program specialists interviewed, four appear to have the necessary credentials required for this position under the law, but there is no information about two others. All were experienced in working with children with exceptional needs. Two program specialists with SH and LH credentials also had administrative certification. One of the program specialists with a CH background had acquired an MA as well as a certificate of clinical competence.

One program specialist works in the area of this person's expertise, CH and hard of hearing, and another program specialist was assigned responsibility for an assessment team that serves 14 schools. A program specialist with experience and training in the area of the severely handicapped works with all the county's autism programs. This program specialist also has responsibility for a consortium of districts which included 50 resource specialist programs and 50 special day classes.

The other three specialists were accountable for a geographic area and specific grade levels. One program specialist had 10 schools with LH and resource specialist programs to attend to; another was assigned 10 districts containing 28 schools, 45 programs including LH, special day classes and resource specialist. The last program specialist was responsible for the entire high school district and post secondary programs, along with a special high school and six students in private schools.

II. ACTIVITIES

Identification and Referral

Five out of six program specialists said they were involved to some extent in identification and referral. Although there was no information about this function by one program specialist, the consortium of districts for whom this person worked hired a special education director to handle the compliance function.

One program specialist assisted new teachers of the learning handicapped and resource specialists in the referral process, another program specialist functioned as a coordinator of an assessment team. This team received referrals and held pre-assessment meetings, at which time remediation strategies were suggested and case-carriers assigned. One program specialist spoke of working with the IEP team once it was established, and another was involved in referrals for special day classes.

Assessment

Only one program specialist had responsibility for assessment as an ongoing part of the job. This program specialist did language assessment for psychologists and other program specialists and speech therapists, as requested. These assessments were mostly at the pre-school level. One program specialist, as noted earlier, coordinates an assessment team and insures that parents and professionals read the required documents, thus pulling the case together. Another program specialist requests psychologists do assessments and assists teachers and resource specialists in testing. This program specialist perceives this function as consulting on assessment. Two other program specialists also indicated they assist and consult, but do not directly assess students. The one program specialist who did not mention involvement in assessment was responsible to the consortium of districts.

Instructional Planning

A majority of program specialists consult and assist special education personnel and resource specialists in instructional planning. A few program specialists mentioned providing materials for this process.

It appeared from the interviews that IEP/EAS meetings provide the arena within which program specialists work with other professionals on instructional planning. The program specialist who specialized in CH and hard of hearing consults with speech therapists and others about instructional planning for an IEP. One program specialist spoke of "chairing IEP" meetings and eliciting consensus on instruction/placement, in this manner. Another program specialist chaired EAS meetings and stated that "writing objectives" had been one way in which this program specialist took part in this process.

One program specialist reported spending up to 3 hours a week assisting special day classes, and this individual noted that they "may do the entire planning for this type of class."

Placement

All program specialists have some responsibility for "placement" decisions, but there are differences in the degree of involvement and emphasis. When the schools or district have articulate, well informed and outspoken parents (cited by two program specialists as a rationale for the amount of time devoted to placement) or when the specific responsibilities designated to a specialist demand involvement, then participation tends to occur in first level IEP decisions. One program specialist, who serves high SES schools, defined "placement" as "the source of our problems." This program specialist worked with new staff on placement decisions and considered "awareness of resources at the district level" as "unique to the job." This program specialist also monitored private school placement.

Two program specialists cited "placement" as a significant component of their work. One of these specialists was noted above because of participation in first level IEP meetings, the other operated mainly during EAS meetings and special day class referrals, unless a referral came from a high SES school. Then this program specialist would participate at an IEP meeting.

The program specialist who specialized in CH and hard of hearing attends EAS meetings occasionally at the request of CH teachers and assists in placement.

A program specialist who chairs the IEP team meeting, assists the group in reaching a concensus on placement decisions. The program specialist who operates the assessment team consults with parents and staff in both entering and exiting programs, as well as working as a member of the IEP team on placement decisions.

Instruction

None of the program specialists interviewed were involved in direct instruction; two mentioned giving demonstrations to resource specialists and special day class teachers and "modeling programs." Two spoke of "observing" instruction, and the program specialist in communicatively handicapped and hard of hearing consults with speech and language personnel about instruction. Three program specialists said they provided materials for instruction; DIS personnel, special day class teachers and resource specialist in the high schools noted the usefulness of the program specialist functioning in this area. Special materials, especially for high school students, were claimed to be in short supply. One of the program specialists observed, helped a speech therapist write a grant for an expensive piece of new equipment to aid instruction and therapy.

Student Review

Five of the six program specialists interviewed take part in different facets of the student review process. Two program specialists chair the EAS meetings, one "assists in review if it is part of placement." Another provides this service if "parents want alternatives." Two spoke of having responsibility for the formal review of special students (insuring they occur). The CH, hard of hearing specialist is not directly concerned with the "compliance" aspects of review since the SESR has designated one individual to monitor compliance.

Program Development and Innovation

The program specialists interviewed did not indicate extensive involvement in this area. One program specialist encouraged grant writing, another helped institute a child study team. Two spoke of "implementing" rather than initiating programs and one (the CH, hard of hearing program specialist) consults on program development. There was no information from the program specialist who worked with the consortium of districts.

Program Review

The only program specialist who specifically responded to this category spoke of going through the folders of resource specialists and special day class teachers and reviewing mandatory forms. Program evaluation narrowly defined can be perceived as Pupil/Program (IEPs) reviews and in this sense, program evaluation is performed. Program evaluation defined as assessing the success or failure of how resource specialist programs or special area (DIS, special day class) programs are operating, was not a function of the program specialist's role according to those interviewed.

Staff Development

Two program specialists consider staff development a significant part of their responsibilities; one program specialist is in an SESR that has only been in the Master Plan for 2 years, and one other program specialist conducts staff development on a regular basis. One program specialist does it a lot, but "didn't like it," another program specialist was a member of a staff team which organized inservices, but this specialist did not perform any.

The program specialist in the SESR new to the Master Plan, spoke not only of staff inservice, but of working on a parent handbook, teaching sign language to administrators, and helping parents and schools on mainstreaming. The program specialist, who is involved "regularly" in staff development, has monthly meetings with resource specialists and special day class teachers and conducts separate inservices with new special day class and resource specialist teachers on the Master Plan. According to the communicatively handicapped-hard of hearing specialist and others in speech who were interviewed, a significant accomplishment was the "job-a-like" inservices that this specialist initiated. Two speech therapists questioned in this SESR felt "job-a-like" staff development was more rewarding than the general meeting that had preceded these. This specialist also coordinates workshops with a local college.

III. PERCEIVED ADEQUACY OF FUNCTIONING/CHANGES NEEDED

Three of the six program specialists perceived themselves as most effective in some aspect of the referral to review process. One program specialist emphasized skill as coordinator of IEP meetings and an ability to insure appropriate placement decisions. Another felt the "global view" or cosmopolitan perspective of a program specialist is valuable for the coordination function.

One specialist experiences a sense of accomplishment in an "area of speciality" (the individual with the M.A.), as well as in knowing where to get good materials for high school resource specialists and other special education personnel. This specialist and one other felt effective in resolving "conflicts." A third program specialist dealt with the issue of controversy by preventing conflict, claiming success in "bringing about cooperation with staff."

The communicatively handicapped-hard of hearing specialist felt the job-a-like inservices were an achievement and also noted how the program specialists had "equalized services."

Another program specialist said that the ability to focus on curriculum the second year, rather than compliance, contributed to increased effectiveness in this role. This program specialist also felt effective in scheduling priorities. Three program specialists mentioned "skill in scheduling" as important in the functioning of a program specialist.

Three program specialists perceived their role with parents as a contribution and one called this a position of "parent" advocacy.

Three specialists interviewed spoke of a lack of time, of being "spread too thin" and of a need for more "hands on experience." Others interviewed also felt it desirable that program specialists be more accessible and the term "hands on experience" was used on a minimum of three occasions.

The "boundary spanning function" of program specialists was considered a problem in a number of ways. Two program specialists specifically spoke of competing "educational philosophies" among the different groups and individuals they dealt with. And three program specialists complained of the inability to perform effectively if administrators were reluctant to cooperate. One program specialist suggested a need to provide inservices for administrators, another felt the different "personalities" among the administrators required continual readjustment on the part of a program specialist. A third specialist stated that program specialists have "no authority without a superintendent's support."

Role conflict between being perceived as "experts in curriculum," versus "administrators or supervisors," was cited by three program specialists. One program specialist felt it was "hard to be a specialist in all areas... and impossible to stay abreast of curriculum change." This specialist also experienced greater satisfaction and reward from the consultant role, rather than the supervisorial one. Another program specialist was viewed as an embodiment of "the law," according to a speech therapist in this RLA. This same specialist stated the role was one of a "consultant, not a boss or supervisor, being aware of others' perceptions." Another specialist said "I do not evaluate teachers" in order to reinforce the consultant role.

Other problems presented by program specialists were related to the perceived inadequacy of special education personnel (special day class teachers in particular), the lack of acceptance of the Master Plan by regular classroom teachers, the difficulty of contacting individuals given limited time ("People are not always available when needed."), and the need to bring about better cooperation with staff.

Two program specialists said they would like less territory to cover and one program specialist reported the role could be more effective if there was "greater depth in one area rather than spending time on petty things." One program specialist said that the assigned responsibilities prevented "follow through" and wanted an "opportunity to plan a student's educational program" from elementary through high school. The program specialist working with the assessment team felt "too much time was spent in assessment, more time should be spent in implementation of findings."

Two program specialists would like to see an increase in financing, and one of those interviewed felt some of this money should be earmarked for conferences, workshops and reading materials. This specialist felt there was little interest in the professional growth of program specialists, given limited financial support for this purpose.

One program specialist felt clinical experience which emphasized a team approach was valuable training for the program specialist role. Another program specialist found initial inservices provided by the RLA as very useful. A third program specialist perceived experience "parenting" as beneficial, along with knowledge about how classrooms and schools operate.

A program specialist who was assigned a specific territory recommended experiences in both regular and special education classrooms to gain knowledge of curriculum; counseling and communication skills were also considered as helpful when functioning as a program specialist. Another program specialist stated that management skills, such as a knowledge of how to establish priorities, manage time and organize activities, would be useful. This program specialist also desired to learn more about interviewing techniques and areas of handicapping conditions.

APPENDIX B

CASE STUDIES

(Complete Ethnographic Records of
Interviews Conducted in Six Special
Education Services Regions in
California)

SPECIAL EDUCATION SERVICES REGION #1

This SESR was chosen because it is a rural, county-wide SESR that has been under the Master Plan for four years and hires its program specialists under an administrative contract.

The first interviewer spent two days in an elementary school (Site 1) and saw nine people. Those interviewed included: the principal, a resource specialist, a parent of a handicapped student, two psychologists, two special day class teachers, and two regular class teachers.

The second interviewer spent one day interviewing and observing a program specialist. During that period there was an opportunity to attend an EAS meeting for an out-of-town transfer student, and to meet with his mother prior to and after the formal IEP discussion. Another significant experience was the chance to observe the program specialist working. This researcher also was able to observe the program specialist working with a regular classroom teacher--reviewing that teacher's assessment of a student in order to place the student in a special day class. The next day was spent at Site 2 interviewing a resource specialist and six other professional staff members.

I. RESOURCE SPECIALISTS

Site 1

This is a rural elementary school with a low SES and a sizable bilingual population. There is a migrant education program at this site. The school's total population is 400-500 pupils.

Resource Specialist I

A. Self Perception

1. Present Assignment and Past Experience

The resource specialist had been in his job for only one month. Prior to this position the resource specialist taught a special day class for learning handicapped children in an elementary school for one year. He was a speech therapist for seven years before coming to the school last year.

Some of his most helpful experiences and additional training have been a result of attending conferences. Teaching of reading workshops and conferences on SRA, ECI, and direct instruction were most helpful. Observations of other teachers also strengthened his understanding of instruction.

Employed in a full-time work assignment, the resource specialist's caseload at the time of the interview was 17 students. He often sees 10 children beyond the official caseload every week when working with groups in the classroom.

2. Activities

Four hours of the day (over 50%) are spent in direct instruction and two hours are spent in referral, placement, and assessment. Two to three hours every day beyond the regular work day are spent in writing reports and doing planning.

Of the 30 hours a week the resource specialist is officially on-site, roughly 20 of these hours are spent in direct instruction. The remaining 10 hours are divided among other duties with 4 hours a week in planning, 6 hours a week in the referral-assessment-planning-placement review and all the accompanying paper work and meeting time. The resource specialist estimates spending additional personal time of 10-15 hours a week on weekly planning and coordination of IEP Team activities. This could be due to his relative inexperience in this position. He also spends about 1-2 hours a week consulting with special day and regular class teachers in program development for their classes as a form of informal staff development. Most formal staff development is done by the school's principal whose area of expertise is special education.

3. Job Definition

The resource specialist has never seen his job description but is aware of its contents and feels the requirements are being fulfilled. He is accountable to the principal as immediate supervisor as well as the RLA director under the Master Plan. He feels that he determines what he does guided by the nature of his job. The only direct instructions he receives is in the form of referrals from the principal.

This resource specialist feels all resource specialists in the area work in the same way, but the instructional aspect of their work may vary depending on their area of expertise of an individual specialist. The job actually has three main aspects, all of which need one's involvement: testing, conferencing with staff and parents, and direct instruction. The resource specialist's role is unique in the school and no one overlaps with those activities. The school staff coordinates itself so that this problem of overlap is avoided.

4. Efficiency/Effectiveness

Physical aspects of the resource room inhibit the work because the room is shared by many other programs and the noise level gets very high. The work area is also small and cramped.

The resource specialist feels his teaching is highly effective both in direct instruction with children as well as in consultation with teachers on students' needs. The demands of assessment cut into his time for direct instruction so he uses his aide to help in this problem by giving him some of the direct instruction work.

The most satisfying aspect of his work is direct instruction and the positive reception teachers give him on his teaching and consultation.

The least satisfying aspects of his work are the time constraints (this, is interpreted as meaning the large amount of work required of him that tends to exceed the time allotted for the position) and the small physical space of the work area.

5. Useful Experiences/Training for Present Position

The most useful aspects of his formal training were his diagnostic classes and assessment training. A behavior management inservice from the principal was also very useful, but he would not like any more training at this point in his work.

The resource specialist would recommend that student teaching plus three years in a classroom be the minimum requirements for someone entering the resource specialist position. He also feels that the resource specialist training should include an internship so that the resource specialist can learn how to be an itinerant teacher. Since the resource specialist often has to do counseling because of the dearth of counselors in the elementary school, counseling training would be useful.

6. Recommended Changes

The resource specialist would like the paper work to be done by someone else. This means someone filling out forms, setting up meetings, typing reports, and performing any other clerical duties.

He does not think, like his principal, that someone else should perform assessments. Perhaps the psychologist could do the norm referenced testing, but a resource specialist needs to administer criterion tests in order to design the IEP and provide effective instruction. Therefore assessment duties can only be partially eliminated.

Fewer children in a caseload would allow him to be effective in all aspects of his work. His current load of 17 is ideal, with the aide dealing with 5 children a week and the resource specialist dealing with 12.

Unlike the principal, he could not see the job split into two roles, one job as a "service delivery system" and the other as "coordinator and assessor." He thinks he needs to be in all the aspects of the job as they exist except for a bit less clerical duty and less norm referenced testing.

Counselors on-site would lessen his demands to do counseling as well as instruction.

B. Other's Perceptions

Principal - He views the position as being possibly two jobs, one job as a "service delivery system" and the other as "coordinator and assessor." He questions the likelihood of funding for such as arrangement. He looks at the resource specialist program as a "push-in" program with the resource specialist working with children in the classroom as much as possible and pulling-out only for special needs. (This seems to be the goal of the program here, though currently it appears to be largely pull-out from what was observed.) He feels the resource specialists are generally not trained well enough for this position due to low requirements of older laws, so their effectiveness is inhibited by a dearth of training. He feels that *his* resource specialist is effective in the position and that it can be done effectively by others who are well-trained in this role.

The principal feels the position has a high stress level, resulting in an early "burn-out" rate among resourse specialists. This stress evolves from the size of the caseload and the varied activities and responsibilities of the position. The position has a "problem solver aspect" that adds to the stress as well.

The principal agrees with the resource specialist's description of his involvement in IEP team referral process as being on the "front-line." The resource specialist contacts parents to begin the process and then coordinates the necessary activities. The principal keeps all referral forms so every referral must go through him first. He makes sure all possible sources are exhausted before it becomes a special education referral.

Regular Classroom Teacher (1) - He views the resource specialist's activities exactly as described by the resource specialist himself. He feels the resource specialist program is only as good as the resource specialist is himself. This teacher believes the program should have a strong academic focus.

Regular Classroom Teacher (2) - He also feels that the resource specialist program is only as good as the resource specialist in that position. He believes a good resource program can affect change in the child's work if it's focus is academic.

Parent of resource specialist child - This mother was very satisfied with the resource specialist program and would like to see the amount of time in direct service increased. She felt that the resource specialist was very accessible to her and clearly explained assessment findings as they related to her child's needs.

L.H. Teacher (1) - The resource specialist has given this teacher ideas and materials to help him in his work with the class. He feels the resource specialist is very effective but that there is a need to increase the number of resource specialists in a school and cut their caseloads in half to help them have time to be more effective.

L.H. Teacher (2) - He was happy with the informal consultation about classroom programming he receives from the resource specialiist.

Both psychologists perceived the resource specialist's activities as he described them. They also feel resource specialists are very useful and effective in helping children.

"Allow resource specialists more time to work with children" was a common criticism of the resource specialist program made by other teachers and the parents. They suggest either an increase in the number of resource specialists at a school and/or a decrease in the caseload as one solution to this problem.

Site 2

This elementary school is described by a number of informants as having a mix of students. There are new residents who are upper middle and middle class, as well as pockets of low-income families. It is a K-5 school ranging between 300 to 400 pupils.

Resource Specialist II

A. Self Perception

1. Present Assignment and Past Experience

He has been a resource specialist for three years and a reading specialist for 12 years

2. Activities

"I spend a majority of my time with children. The rest of the time is spent diagnosing, planning and conferencing with people. I do some assessing."

"I interact with parents a lot, and teachers." This contact is continuous and informal. "I contact them, I like to know my parents and I have had good cooperation and most are ready to help." He continued: "In preparation for the SAT meeting, I spend time in regular classrooms and talk with teachers about their children and daily events.

The principal chairs the SAT meetings.

Referral initially is done by the classroom teacher. The teacher refers a child to the principal and that teacher gets a parent's signature. The resource specialist contacts parents and explains their "rights" to them in language they can understand. This specialist also calls parents immediately before an IEP to make certain that they understand the process. When referrals are made the resource specialist does an academic assessment of the pupil.

"I do instructional planning for my children and keep a copy for parents, if there are any questions. I tell them (parents) to call, and they do. Last year a third copy went to teachers, but now there are new forms. We work informally now (with teachers)."

"I spend a majority of time in instruction. I inform a child of his or her IEP. Every child knows the plan, even the little ones. Pupil review, or evaluation is done when needed in order to see if there is real growth. FIVE EXITED LAST YEAR (at grade level) and one had to return. I do a formal review every six months."

"I do research on curriculum, and I like to be updated. I use magazines in the college library, and talk to parents." He watches county inservices and attends if interested. When he wants updating on vision therapy he visits on optometrist.

"I give a reading comprehension and brain development inservice. I showed two teacher how to develop visual memory. I do staff development, mostly informally."

The resource specialist sees himself working on brain development and does not focus on behavior. "I work with parents to explain growth. The psychologist is the individual who helps families with behavior problems..."

3. Job Definition

Resource specialist II knows the law, but has a great deal of autonomy over his activities, which are primarily instructional. Legal compliance is seen as significant for the formal part of referral to review, but instruction is perceived as the primary function of a resource specialist. Therefore, within the confines of an IEP the specialist is free to operate in whatever manner is perceived as effective. His immediate supervisor is the principal.

4. Efficiency/Effectiveness

He is mainly dissatisfied with the amount of time alloted students. Last year students had resource for an hour. Recently one block of time was cut into two and now there is only a 30 minute time allotment with students. "Otherwise, I am so happy with the school and the range of children. When you have determined what the needs of the child are, those are the needs you address and I think this is a terrific way to go! I feel comfortable and happy in my position. The child wants to come to school."

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

The resource specialist reported that the "needs of bright children are not being met by me. We have quite a range of students and I feel we should be able to service that range." The way the service is defined, the specialist noted, prevented him from helping "learning disabled children scoring at grade level, but who can do better."

B. Other's Perceptions

The principal felt the resource specialist in his school is valuable because of his "background as a reading specialist." He also believed that "classroom teachers are not as good." He described the resource specialist as "personable, well organized, good at preparation and follow through with IEP." He felt the resource specialist was good at identifying needs, and most important of all "is his quality of CARING." The principal reported that none of the children in the resource program are tracked or labeled. They get special help because of special needs...and they look forward to help. The specialist has good working rapport and his advice and help in designing programs is effective. The children are not missing out. Parents feel comfortable coming to him. He phones them all the time. He comes to parent teacher conferences.

Teachers - These statements highlight faculty responses.

"I am impressed with what he is able to do." "He provides materials or suggests programs." "We are pretty good friends." "He gives practical suggestions." "He gives advice on problems and how to handle them...not just philosophical, but practical." "The pre-assessment program is of value." "Children feel good about themselves in his program." "I adopted programs for all kids, from information received from the resource specialist. I really trust his judgment." The resource specialist is much better than an "itinerant resource teacher."

II. PROGRAM SPECIALIST

A. Self Perception

1. Present Assignment and Past Experience

His territory covers 10 districts, 28 schools and 45 programs (Special Day Classes), and resource specialists.

This program specialist has LH and SH Credentials. He spent six years teaching at a treatment center and had worked for five years with the learning handicapped. He also has experience with the communicatively handicapped. He has taught at a university and provided staff development on severely emotionally disturbed. He was a resource specialist prior to becoming a program specialist.

2. Activities

Referral: As a program specialist he is involved in referral: "Part of work" involves observation for one hour meeting with parents, of at least two hours. "I did 100 last year."

Assessment: "It is looking at material, training. I do it on a one-to-one basis. Integral part of what I do all day long." This program specialist saw his role in assessment as an "informal" evaluation process.

Placement: "Takes time. Parents want specific programs and I don't always address these requests. I may take parents to different classes, from a two-to-four-week process. It depends on the level of people, if alternative programs are requested. Two weeks of logistics of putting child in a program. I stay away from interdistrict transfer because of the time involved."

Instruction: Not direct. "I demonstrate to teachers and parents. Program works with parents." The RLA has a program called "Therapeutic Homes," a branch of family intervention.

Program Review: "Is a child getting his needs met? It involves assessment, the IEP and is a team process."

Research/Innovation: "I read and look at issues in order to handle problems."

Program Development: "I helped to develop and put together a child study team."

Staff Development: He said he did a lot of it, but this was not his favorite assignment.

3. Job Definition

The RLA director is the immediate supervisor of all program specialists. Although the job description in this RLA emphasizes compliance and program specialists were required to have an administrative credential, the day-to-day priorities are determined by the specialist. As this program specialist reported, he has gone beyond using the laws as a "security blanket," and some of the activities he carries out this year are in response to educational needs.

4. Efficiency/Effectiveness

"I am good with people. I am good at assessment, curriculum diffusing and rebuilding a tough situation. I am organized and logical and very systematic."

"Ninety percent of the job is PR and personality...handling pressure and people wanting things from you...ten calls for crises. You check with the resource specialist to see if a student qualifies for a special day class. Then you go to the class and observe the child. There is a need to talk to the regular teacher. In insuring the right placement everyone must approve; it is a team decision."

This program specialist substitutes and allows resource specialists to observe an expert in an area they are interested in knowing more about. "I have 'good rapport' with teachers. As a program specialist, I help teachers in curriculum, provide materials, and send them to observe."

"I work with a parent who wants a particular service and the teacher has a different philosophy. I have no authority to do anything, no supervisor to go to...a Special Education Director has sixteen other hats, and this is not part of his role."

"Part of the job is 'knowing all personalities.' I am involved with articulation between teachers. There is a level of trust built up between parent advocates and program specialists. Program specialists 'mediate needs for their children.' Parent advocates, i.e., local CANHC, offer advocacy that is not part of the program specialist's role. "

"I have a finger on a lot of things. Politics. I pick up things. I have solved problems by talking to the classroom teachers. I diffused a difficult situation by taking a teacher to lunch." "Role of trouble shooter." "I told the teacher why a particular student was placed in her class."

Problems: "I can be a 'bull in a china shop.' I am so organized and systematic. I don't always take people through the steps...don't have time to do that. Yet, people have to buy it too. I am bored of manual processing and don't have a real interest in inservice."

"Program specialists are 'consultants' not bosses. They are not supervisors. I try not to come across as a supervisor or evaluator. It is impossible with ten districts to be a supervisor. With two districts a program specialist could be an administrator. There is a "different aura" when helping clients as a specialist."

"Since a program specialist does not have line authority, he/she relies on 'respect' or 'support' with individuals he/she must deal with. Students are placed preferably within their attendance area. Interdistrict placement used to be a problem...it depends on the personality of the program specialist. I try and persuade others what is best for kids. I can't tell, can only suggest."

When he began as a program specialist, his emphasis was on compliance. My "security blanket was the laws." Now he is comfortable on the job.

"An important part of my job is 'setting priorities.' I can't be consistent in scheduling." He tries to hit all schools at least once in every two week period. "Too much driving. Two hours in a car getting from one site to the next." He tries to visit as many programs within the same geographic vicinity at any one time as possible.

"Sometimes we do not work as a team...there are so many schools." The program specialist cannot be present all the time and there is a lot of ground to cover. With less territory I would be more effective."

'Too much traveling, diverse personalities and not working as a team contribute to inefficiency."

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

No information.

B. Other' Perceptions

RLA Director - He mentioned changes in program specialist operation in the second year. "They do more inservice, provide 'educational leadership' within the SESR. Initially they were seen as 'supervisory.' They formerly had to have an administrative credential."

He sees them as "hands on," type of people. "A consultant with a wide breadth of knowledge." The "key" is curriculum and "getting along with people," as well as getting things done. They must have the personality to get along with people." Three or four have doctorates.

"A goal is to get all program specialists in all classrooms 3 times a year. Participate a lot in EAS, special classes and resource class."

Their major accomplishments are an "ability to work with regular and special teachers to encourage mainstreaming." They have the ability and knowledge to handle "difficult parents." "EXCELLENT FACILITATORS."

Each put on one-half dozen formalized inservices (vocational, assessment instruments, IEP, etc.). County will inservice what is needed, according to the director.

Resource Specialist I - The resource specialist and program specialist have a professional relationship based on the resource specialist's former position as an LH teacher. He uses the program specialist as a resource for ideas when he is "stuck" over a specific activity. The program specialist asesses children when the resource specialist is confused about needs. The program specialist also explains laws and forms to the resource specialist.

Speech Therapist - The speech therapist has been in her position for 1½ years and on the job for 3 years. She reported the program specialist provides her with information about laws, regulations and forms. "They attend SAT/IEP meetings. They are the next step up the hierarchy. They can't be blamed for legislative changes. They do DOWNFIELD RUNNING. They also introduce new materials as well as explain new laws and new forms. I ask program specialists about the logistics of handling an SAT."

Principal - "I have no regular contact with the program specialist, but I know him and like him. I'm not involved in inservice this year. It changes every year." He contacts program specialists as needs arise. "Their function relates to the law. They facilitate referral and new screening procedures." Program specialists are spread so thin," more is added and nothing taken away." The principal felt legal changes increased the responsibilities of program specialists, thereby making them less effective.

Resource Specialist II - "The program specialist's service is satisfactory. If I need anything I call the program specialist, but 'NOT VERY OFTEN.' I will be seeing him soon since we have two children to talk about. He goes through my records and audits."

Teacher - Reported "no contact with program specialists," he said, "they seem like Gods to me."

Parent - A parent was present during the formal review process the researcher observed. Since this was not set up as a formal interview, the researcher was only able in casual conversation to get a sense of the parent's support for and satisfaction with the help provided by the program specialist. This mother was very pleased by the attention her son had received from special education personnel her son had contact with, in comparison to the services he had received in another state.

SPECIAL EDUCATION SERVICES REGION #2

SESR #2 possesses the following characteristics: it is a consortium; it has been operating under the Master Plan for 4 years; and its program specialists are categorized as "other personnel," since they perform a variety of functions.

Two interviewers spent two days in this area interviewing school personnel. One interviewer spent a day on-the-job and conducted interviews with a program specialist, a compliance officer, a school psychologist, a resource specialist, a speech therapist, and a program specialist. The other interviewer visited two elementary sites the first day and both interviewers spent the second day at a high school.

A total of five schools were visited: three elementary schools, one high school and one continuation high school. The following people were interviewed in these schools: six resource specialists, two principals (one also serving as a Superintendent of Schools), one speech therapist, one teacher of the communicatively handicapped, and one teacher of the learning handicapped.

I. RESOURCE SPECIALISTS

Site 1

Site 1 is located in a community comprised mainly of unemployed loggers. It represents extreme rural poverty. This K-8 elementary school has an enrollment of 75-125. This school withdrew from Title I, although it qualifies. According to the resource specialist, 30-40% of the students test in the bottom quartile; 15 out of 86 receive services. There is constant turnover of staff.

Resource Specialist I

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has been in her present position for five years. Formally she had been a teacher of the educationally handicapped and in private business. She has a General Elementary and an LH credential.

2. Activities

Assessment - She monitors students for 3-10 days. She assesses every six weeks. She assists the nurse with vision screening.

Instructional Planning - She does this as an ongoing part of the job.

Placement - Part of IEP team. She has problems in writing IEP's and contacting and working with parents.

Instruction - She works informally with accelerated students on speech and language.

Review - She conducts reviews every six weeks.

Staff Development and In-service - She makes formal presentations to the staff twice a year.

Parent Education - She doesn't believe this is possible.

3. Job Definition

The principal is this resource specialist's immediate supervisor.

4. Efficiency/Effectiveness

This resource specialist judges herself to be most effective teaching self-discipline and skills in reading and math. She feels least effective dealing with behavior problems. She thinks students with behavior problems are very difficult to work with and she gets impatient with them. Paperwork was mentioned as a main cause of inefficiency.

5. Useful Experiences/Training for Present Position

This resource specialist regards the general business experience she has had as the most useful to her in her work with children. She feels she knows what they will face after they are out of school and what preparation they need for later life. She has found on-the-job workshops in "goal setting" very valuable.

6. Recommended Changes

She thinks if resource specialist aides were taking on more instructional responsibility in the pull-out program, resource specialist could spend more time in the classroom, working with larger numbers of students and helping teachers develop individualized educational programs for all students needing them.

B. Others' Perceptions

Compliance Officer - The resource specialist is skilled in visual screening. She lacks skills in interpersonal relations and her objectives are of "mixed quality." She questioned the resource specialist's criteria for "exiting students."

Speech Therapist - She has informal contact with the resource specialist regarding students who are enrolled in the resource specialist program and who also receive help with speech and language. The resource specialist provides her with background information on children.

Site 2

Site 2 is a kindergarten through 6th grade elementary school with an enrollment of 400-500 pupils. It is located in a low-to-middle-class rural community.

Resource Specialist II

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has been working full-time in her present position for three months. Prior to this she worked as an LD teacher for two years, a high school resource specialist aide for one-and-a-half years, a Title I reading teacher for two years, and a reading aide for one-half year.

She has Learning Handicapped and elementary school credentials. Her current caseload consists of 14 students, K-4.

2. Activities

Referral - Referrals are sent to the resource specialist for assessment by way of the principal. This resource specialist informally communicates with teachers regarding referrals.

Assessment - She conducts academic and sensory-motor assessments. This take approximately eight hours per week. She expects it will taper off as the year goes on.

Instructional Planning - As an IEP Team member she contributes to the development of long-term goals for students. From these long-term goals, she formulates a daily instructional plan. She coordinates this planning with the student's regular class teacher and is sometimes assisted by the program specialist who brings her instructional materials. She spends about eight hours per week in this activity.

Placement - As an IEP Team member she helps make placement decisions.

Instruction - She instructs one-to-one and in small groups. Her aide assists her. Approximately 24 hours per week are spent giving instruction to students.

Review - At the time of this interview, the resource specialist had not conducted any reviews but she reported that ones were scheduled for mid- and end-of-year.

3. Job Definition

The way the responsibilities had been described to her before she took the job closely resemble her actual tasks with one exception--there's more pressure! She is given complete freedom to schedule her work, develop instructional plans, and group her students.

4. Efficiency/Effectiveness

One thing that this resource specialist feels is distinctive about her work is her recognition of what students need in the way of instruction and her ability to match materials to those needs.

Presently, she feels she is most effective working directly with students, but eventually, she'd like to work more with teachers (e.g., helping them develop instructional materials, making suggestions regarding instruction).

Time constraints, newness to the position and a feeling of being "out of touch" with "regular" students (i.e., she "forgets what normal looks like") are some of the barriers/problems which cause her to feel less effective than she'd like to be.

5. Useful Experiences/Training for Present Position

Work as an aide in the resource specialist program and as an LD Teacher (where she had to organize a whole class on own) provided training experience for her present job.

Now that she's been on the job for three months, she realizes that she lacks some experience in counseling children with emotional problems and knowledge about perceptual motor activities.

Recommendations she would make to others in regard to training and experience if they were considering a career as a resource specialist, would be to learn how materials can be useful in remedying special problems and learn different ways of organizing resource programs.

6. Recommended Changes

This resource specialist would like to have closer contact with teachers and eventually thinks she will.

B. Others' Perceptions

Principal - This principal consults regularly with the resource specialist about referrals. They both meet with the students' parents to get consent to carry out an assessment and both are present at the IEP Meetings to discuss assessment findings and placement possibilities.

The principal definitely feels that the resource specialist position has increased the quality of special education services by providing staff with specialized knowledge and has made possible the mainstreaming of special education students.

Special Day Class Teacher - LH - This teacher has relatively little contact with the resource specialist. When she has, it has been informal or occasionally at an IEP Team Meeting. Her perception of the resource specialist's role is that she serves as a resource to regular teachers, an advice-giver to parents on how to work with their children and a schedule-keeper with teachers (i.e., of the student they both have in common).

She thinks that the services of resource specialists are essential because they provide specialized knowledge of handicapping conditions which most other staff members are not trained to deal with.

Teacher of the Communicatively Handicapped - This teacher's contact with the resource specialist has been minimal, informal, and occasionally occurs at IEP meetings. The resource specialist, she feels, has helped in making more special education services available to students.

Site 3

Site 3 is a kindergarten through fifth grade elementary school with an enrollment of 400-500 pupils. It is located in a low-to-middle-class rural community.

Resource Specialist III

A. Self Perception

1. Present Assignment and Past Experience

This full-time elementary school resource specialist has been working in her present position for three years. Previously she worked for one-and-a-half years as a resource specialist aide, one-half year as an LH-DIS instructor, and two summers at a school for the severely handicapped. She has LH and Elementary Teaching Credentials.

Her present caseload includes 22 students in grades 5-8.

2. Activities

Referral - Teachers complete the referral form and submit it to an IEP team. Recommendations for remediation are made and/or an assessment is conducted with the consent of parents.

Assessment - The resource specialist administers academic tests. A psychologist administers I.Q. and mental ability tests. Also program specialists are, at times, requested to do assessments. Regular teachers are frequently asked to observe and save samples of a student's work. The nurse does physical screening (vision and hearing included).

Instructional Planning - In planning the students' instruction, she will consult with appropriate personnel depending on a child's problem (e.g., the nurse if it's a physical handicap, etc.). She relies on a team approach to determine the handicapping conditions and to establish the educational objectives for the student. Then, she will personally design an instructional plan based on the IEP.

Placement - This resource specialist helps make placement decisions as a member of a team with the referring regular teacher, principal, and parent.

Instruction - She reported almost all of her instruction is one-to-one and individualized. She collaborates with regular classroom teachers on some of her students' instruction; for other students she provides all the materials. Under her supervision, her aide provides some of the instruction, as a program specialist works with some students one day a week.

Review - This resource specialist contacts parents on an ongoing basis to talk about a child's progress. She conducts periodic up-dates on a student's progress at school; and she does a formal review annually for each resource specialist program student. The classroom teacher, psychologist, principal, parent and nurse and any other appropriate personnel may be involved in the formal review along with the resource specialist.

Staff Development and In-service - This resource specialist does not provide formal inservice training, but informally consults with individual teachers daily.

Program Review - With the assistance of the program specialist, this resource specialist reviews every area in which the resource specialist program has responsibilities (e.g., assessment, instructional planning, etc.) to check for compliance.

3. Job Definition

The principal of this elementary school is this resource specialist's immediate supervisor. The resource specialist states that she "pretty much has a free hand" in her work and will, on occasion, receives helpful suggestions from the principal.

She likes to have a "drop-in" style program so that resource specialist program students as well as regular students feel free to come in and get help whenever they need it. She uses a variety of teaching materials.

4. Efficiency/Effectiveness

This resource specialist thinks her caseload is too large and that there is too much emphasis on paperwork, i.e., the required reports are redundant and forms change so frequently that every year time has to be spent getting re-acquainted with them. This is time she could spend with students. She thinks time-consuming paperwork detracts from her effectiveness as a teacher.

She perceives her expertise in learning handicaps as a distinctive feature of her role as a resource specialist. She also believes that her frequent contacts with staff, administration and parents give her a wider perspective on students because she has contact with most of the adults who interact with them.

She feels that she is most effective in teaching organization and attention skills to students. Also, she feels that she has been able to affect the way a child feels about himself because her individualized instructional planning is geared toward enabling a child to experience success.

This resource specialist claims she is quite satisfied with her work but would still like to return to the regular classroom to teach for a while. She hopes and believes that her resource specialist experience (i.e., having learned to diagnose and remediate learning difficulties and devise individualized instructional plans) will enhance her ability to help students in the regular classroom.

5. Useful Experiences/Training for Present Position

This resource specialist has found her on-the-job experience the most helpful to her in her present work. She'd like to have additional training in auditory dysfunctions and in the area of visual handicaps.

6. Recommended Changes

She is "pretty pleased with her situation," except for the fact that the caseloads are too high for the resource specialist program. Regarding general special education services, no changes were recommended.

B. Others' Perceptions

Principal - The principal said that the one-to-one instruction that students received from the resource specialist allowed for a closer relationship to develop than existed between students and regular classroom teacher. The principal thinks this personal attention has very positive effects on the students.

Site 4

Site 4 is a high school (grades 9-12) with an enrollment of 1,000-1,100 students. It is located in a low-to-middle-class rural community.

Resource Specialist IV

A. Self Perception

1. Present Position and Past Experience

This resource specialist has been working in her present position for three years. She is one of three resource specialists working at her school. Prior to becoming a resource specialist she worked for one year as a teacher of educationally handicapped, as a home-hospital teacher for one year, and as a teacher of the communicatively handicapped for another year. She has teaching credentials in Speech and Language, Learning Handicaps, Elementary, EMR and TMR.

2. Activities

Referral - She recieves referrals from the student's counselor. She gathers information from cumulative records and grade reports prior to the IEP meeting. Then, she attends the meeting with the vice-principal (or designee), the referring teacher and the program specialist. At the meeting, modifications are suggested or a case-carrier (i.e., one of the three resource specialists is assigned.

Assessment - This resource specialist administers a variety of achievement, aptitude and perceptual tests. The County Nurse does a once-a-year screening on each student in the resource specialist program. A psychologist doesn't test all students at the time they are being considered for placement in the resource specialist program, but does a yearly screening on each of them.

Instructional Planning - She selects her own curriculum materials. Each student has a folder containing records of work-in-progress as well as grades they've received on each unit. (Each student's folder is compiled, based on his/her IEP.) Periodically, this resource specialist sends a progress checklist to teachers and uses the information in planning her instruction.

Placement - As a member of the IEP Team, she helps make placement decisions.

Instruction - The largest percentage of her time is spent in instruction and planning. She sees students both individually and in small groups. Her aide, under her supervision, also does some of the instruction.

Review - She maintains ongoing contact with parents, by phone, and in person and sends periodic progress reports to teachers. Once a year, she attends a formal IEP Team meeting to review each student. She also administers post-achievement tests to each student (yearly).

Staff Development - As of this interview, she had not conducted any formal staff training, but is planning to hold at least one session to describe how the resource specialist program operates. She will coordinate this in-service with the other two resource specialists.

3. Job Definition

The vice-principal at this high school serves as the chairman of the resource specialist program. This person has the final authority on how the program functions, but generally allows for a high degree of autonomy among her staff (e.g. each resource specialist selects the curriculum materials used and determines the manner in which the program is structured).

4. Efficiency/Effectiveness

This resource specialist thinks that the greatest effect she has on her students is in her ability to express care and concern for each of them individually.

One problem which she reports is in coming to a consensus with other resource specialists on program decisions. It was not possible for this interviewer to determine exactly where the conflicts originated, but they seemed to have to do with personal style differences (i.e., they think she's too structured; she thinks they're too disorganized).

A second problem, which she regards as a major one, is that the Master Plan regulations require such time-consuming procedures (i.e., getting consent of parents, filling out forms, etc.) to be completed before a student can be readmitted to the resource specialist program that help which is needed immediately is delayed. For example, a student may be discharged from the resource specialist program because she/he is working at grade level, but later falls behind in some area and needs special attention again. Under the current plan, the formal steps which were initially taken in order to admit that student into the program must all be re-done.

One last problem which she feels inhibits her effectiveness as a resource specialist is having too much paperwork and, thus, not enough time to spend with students.

5. Useful Experiences/Training for Present Position

Of all her training and experiences, the things which she finds most useful to her in her work as an resource specialist are having been a parent, having had master teachers who provided good guidance, and having Speech and Language training.

Additional training which she would like to acquire in order to be more effective in her present work would be in reading and vocational education.

She recommends to anyone thinking about a career as a resource specialist that they "like children."

6. Recommended Changes

This resource specialist thinks that attitudes towards handicapped students and special education have improved over recent years but that regular teachers are still reluctant to recognize individual differences in students. This attitude, she feels, creates complications for her when working with teachers, but more importantly, makes life harder for the students who are not succeeding in school.

She would like more time to give direct instruction to students and to organize materials.

Resource Specialist V

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has been in her present position for two years. Prior to this she was a volunteer instructor with the Red Cross and taught severely handicapped students.

She has regular and specialist credentials. Her present caseload is 18-19 students, although she has some degree of involvement with approximately ten other students besides.

2. Activities

Referral - She receives referrals from student's counselor. She attends meeting with the vice-principal (or designee), the referring teacher and program specialist. At the meeting, modifications are suggested or a case-carrier (i.e., one of the three resource specialists) is assigned.

Assessment - She assesses the students' level of achievement in all subject areas.

Instructional Planning - She selects her own curriculum materials. Each student has a folder containing records of work-in-progress.

Placement - As a member of the IEP team, she helps make placement decisions.

Instruction - The largest percentage of her time is spent in instruction (i.e., monitoring students who work out of their folders).

Staff Development - She has plans to hold at least one session to discuss how the resource specialist program operates. This in-service will be conducted in coordination with the other two resource specialists.

3. Job Definition

The vice-principal at this high school serves as the chairman of the resource specialist program. This person has the final authority on how the program functions, but generally allows for a high degree of autonomy among her staff (e.g., each resource specialist selects the curriculum materials used and determines the manner in which the program is structured).

4. Efficiency/Effectiveness

This resource specialist said there are time limitations which prevent students from getting all the help they may need. For example, a student may be assigned to the resource specialist program for help in science, while actually needing help in other areas, as well. She believes that some of the students she works with would be better off in an LH Special Day Class, where the "whole student can be worked with."

She believes there are differences among resource specialists. She said, "personal temperament and effectiveness vary. We don't all produce the same product--it ranges from fair to good." "Motivation and experience affect the quality of a resource specialist's work, as well as skill in diagnosis, and knowledge about testing instruments and remedial materials. Objectives may be the same, but there are demonstrable differences among the specialists."

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

No information.

B. Others' Perceptions

Speech Therapist - She has a lot of contact with the resource specialist: "We meet formally once a week and informally more often." About one-third of this speech therapist's caseload is also in the resource specialist program. There is ongoing communication between the speech therapist and resource specialists about students, and IEPs are developed jointly by these specialists.

Vice-Principal (in charge of curriculum and Supervisor of resource specialists) - She commented that the tendency of the resource specialists was to do their own program, but felt they should be "operating under general guidelines and principles." She said it was hard to get everyone to work together, and viewed her role as an "arbitrator" among the resource specialists.

Site 5

Site 5 is a continuation high school. All of the classes, plus a library, are contained in one large room. The school has an administrator and approximately five teachers. It is located in a small town in a low-to-middle-class rural area.

Resource Specialist VI

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has a caseload of 19 students. The average student spends at least two periods a day in the resource program. Her academic preparation for this job includes an M.A. and a standard secondary credential. Currently, she is working on an LH credential.

2. Activities

Assessment - She sees her role as a "diagnostic teacher." She uses various assessment instruments, shares information she derives from them with the regular classroom teachers and uses the information to design programs for students.

Placement - She tries to "mainstream students as much as possible."

Instruction - This resource specialist began by stating that "students in the continuation high school are more mature than 'regular' students. They are mainly students with reading and math problems. They don't fit in a regular program. They come to school on their own volition and need alternative education." Resource specialists see these students as "more autonomous...they guide themselves." She works on "getting students to pass proficiency exams...That is our goal."

3. Job Definition

She has freedom to determine her own work: she "sets her own goals and standards." Her supervisor is the vice-principal.

4. Efficiency/Effectiveness

This resource specialist is "satisfied with her students' progress," although she reported a few problems which she felt somewhat impaired the effectiveness of the resource program. They include: irregular attendance of students (i.e., truancy); students not wanting to be identified as needing special help; some students not being able to handle freedom (she feels the resource specialist needs to create a structured environment); and the laws being in constant flux.

5. Useful Experiences/Training for Present Position

The most useful aspects of her past training have been in assessment and psychology classes. Her informal education, especially working in the mills, helped her understand the kinds of jobs her students will be seeking and what preparation they will need in school.

She would like additional training in reading. She says that reading is the "biggest problems for students," and that "math problems are a result of inadequate reading skills." She'd also like vocational assessment in-services.

She recommended that individuals interested in becoming resource specialists should "get their feet wet...work with students both in resource and classes for the severely handicapped...know you want to work with kids."

6. Recommended Changes

She thinks there is a need for vocational education and physical education facilities in school. Also, she'd like more money for computers and audio-visual materials in order to "keep kids interested." It is important, she states, to make programs "realistic and to fit needs and interests, or they won't work." And finally, she'd like more "realistic perceptual-motor assessment instruments, because the current ones are inadequate and need more reliability."

II. PROGRAM SPECIALIST

A. Self Perception

1. Present Assignment and Past Experience

This is the second year this program specialist has been in her present job. She is assigned to the programs for the communicatively handicapped. She had previously worked as a speech therapist in a center for exceptional children, a school bus driver, and a school secretary.

She has elementary and deaf education credentials. Her primary responsibilities are to teachers of the communicatively handicapped and hearing impaired.

2. Activities

Assessment - She receives requests to do language assessments by psychologists and other program specialists, especially at the pre-school level. She also does language assessments (including observations) for speech therapists.

Instructional Planning - She consults and makes modifications on the IEPs of communicatively handicapped and deaf children. She also provides instructional materials for these students.

Placement - The program specialist is sometimes requested by the teachers of the communicatively handicapped classes to attend EAS meetings.

Staff Development - Staff development is a primary interest of this program specialist. She has coordinated several in-services, including those available for the speech and hearing department of a local college.

She disseminates information to both general and special education personnel. She spoke of "job-alike" in-services which were developed by the RLA to encourage professionals working in similar roles to share information and educational ideas with one another.

3. Job Definition

She believes her actual functioning is close to what the law prescribes. She sees herself primarily as a "coordinator and facilitator."

Her primary responsibility is to the Assistant Director of the RLA. Her role, as a program specialist, she says is "unique." She is assigned only to Special Day Classes and programs for the communicatively handicapped. She does not deal with legal questions.

4. Efficiency/Effectiveness

One thing which impairs efficiency, she claims, is that "people are not always available to deal with problems and to follow through."

In the past, she said, teachers of the communicatively handicapped did not have well defined classes. The "job-alike" in-services have helped to increase communication among staff, created more homogeneous programs, and better placements.

5. Useful Experiences/Training for Present Position

She considers her experiences "raising children and working in the schools" as very relevant to her present position.

She would like to have a better grasp of reading. She recommends "broad training" to anyone considering a position as a program specialist.

6. Recommended Changes

She would like more time to read materials and work with speech therapists. She'd also like to get into greater depth in one area, rather than spending time on "petty things" (e.g., paperwork, administrative details).

B. Others' Perceptions

Compliance Officer - She thinks program specialists are "well informed regarding the law, strong in assessment, observation and knowledge of alternatives (i.e., services/programs for handicapped students); and are also professional and diplomatic."

She described a variety of ways in which program specialists function in this RLA. Some are responsible only for special education classes and some handle all referrals for diagnosis and placement (both public and private). A majority, however, are assigned approximately 10 to 1[illegible] schools.

She believes that "program specialists in the same place (assigned to specific schools) establish rapport, but they also reach a burn-out point."

Speech Therapist - The following area comments made by the speech therapist refer to two different categories of program specialists:

The program specialists who work directly with speech therapists helps with "forms, treatment and diagnosis," and the "Job-Alike In-services" provided by this program specialist are useful... (they are) "really instructional."

She has very little contact with the program specialists who are assigned to her school on a regular basis (but not in her specialty area). The only time she does see them is at EAS/SAT meetings. Her view of what they do is that they monitor caseloads, assess procedures, sign IEPs, answer questions regarding procedural matters, and insure that the programs are operating according to guidelines.

Her general view of program specialists is that they provide much needed services. They tie schools together and equalize services among them.

Resource specialist (regarding program specialist assigned to her school) - "She is very good. She gives advise regarding instruction, but is more useful in providing compliance information than in assisting in curriculum." She claimed that the program specialist is readily available to her.

SPECIAL EDUCATION SERVICE REGION #3

SESR #3 possesses the following characteristics: it is a county-directed SESR in the Master Plan for three years. It has a rural/urban mix and its program specialists are under instructional contracts.

The district chosen for site visitation had a low SES and was located in a rapidly growing area with an influx of high SES groups. District size was 1,100-1,200 pupils.

Two interviewers spent one afternoon in a primary school (K-3) and the next morning in an elementary school which consisted of grades 4-6. On the second day the lunch hour was spent by both interviewers interviewing a program specialist, who was barely able to fit them into a tight schedule.

Interviewers both worked in each of the schools, spending anywhere from fifteen minutes to one hour with the personnel interviewed.

Two principals, two resource aides, a special education director, a school nurse, two special day class teachers and five regular class teachers were interviewed (one teacher was bilingual). Three resource specialists and a program specialist were also interviewed. These schools were somewhat unique since they had two resource specialists in each school.

I. RESOURCE SPECIALISTS

Site 1

Site 1 is in a low SES area. This school has two full-time resource specialists and all teachers have aides. Of a total of 600-700 students enrolled, 350-400 students are in Title I and many are limited or non-English speaking.

Resource Specialist 1

A. Self Perception

1. Present Assignment and Past Experience

This is the resource specialist's third year in this position. His previous experience was in a private special education school for emotionally disturbed adolescents. He has a standard elementary credential, an EMR credential and an LH credential. The psychologist at the school had in-service during the resource specialist's first year which helped his work with children who had academic and learning disabilities. The psychologist also taught him how to do testing.

2. Activities

Referral and Assessment - The referral process along with program review and consultation/staff in-service takes 3½ hours per week. This comes out to roughly 3% of his week for referrals. The referrals are usually from the teacher and occasionally from the parents. The person referring consults with the resource specialist on whether this referral should be processed through the whole special education process of if there are alternative possibilities to be explored first. Then the first IEP meeting is held and chaired by the psychologist who is also the head of Special Education Services. Those attending this meeting are the parents, classroom teacher, nurse (sometimes), resource specialist, psychologist, secretary for psychologist, and sometimes the principal. The resource specialist does most of the testing unless an I.Q. or personality test is needed. Assessment takes about 5½ hours or roughly 20% of his week.

Instructional Planning - The resource specialist and the same group of people listed above meet in another IEP team meeting to write the goals and objectives for the child. This takes about 1¼ hours per week, or another 3% of his time.

Placement - This same group as mentioned above now decides whether the child needs to be placed in the resource specialist program, either working directly in a pull-out arrangement with the resource specialist or having the teacher help the child meet these goals and objectives directly in the classroom by merely consulting with the resource specialist. This activity requires another 3% of his time.

Instruction - This aspect of the resource specialist's work requires approximately 60% of his time. He sees children in a pull-out program that focuses on their IEP.

Pupil Review - This is done both informally, on an ongoing basis, and formally, at the yearly review. The formal review is preceded by assessments and occurs in an IEP meeting that includes the original IEP team participants. The review process takes about 5% of his time, about 2 hours per week.

Program Review - This resource specialist felt it was done simultaneously with the student review. In other words, no additional review of his program was done other than the review of the student's work.

Program Development - This takes about 6% of his time or around 2¼ hours a week. He helps formulate behavior management programs with teachers for regular children as well as resource specialist program children. He estimates that he easily consults with teachers on 100 children a week.

Staff Development - He looked at this area in the formal sense as being a presentation to the staff. He has done one presentation for the aides as an orientation to the aide position, but no other formal presentation.

3. Job Definition

This resource specialist is assigned to this school on a full-time basis with a caseload of up to 24 children.

His contact with the program specialist is limited by his own choice. This resource specialist views himself as a problem solver so he does not seek help. He said he does see the program specialist when he needs test materials from the county. (See "Others' Perceptions" of program specialist).

The actual job description for the resource specialist states that he is an LH teacher. He does tasks in the IEP Team meetings that exceed the direct instruction description of his job. These are the coordination and consultation activities described under the activities section.

The resource specialist is accountable to the principal and the psychologist, who is also the director of Special Education Services.

After the IEP is written, the rest of his activities such as writing goals and obtaining materials are determined by him. He feels he is different from other resource specialists in the area because he works longer per day with children in direct instruction.

4. Efficiency/Effectiveness

Last year his efficiency was inhibited by his large caseload (approximately 39 children). The reason for this load was the fact that the district could not find anyone to hire that met the resource specialist qualifications. This year his load is normal and they have hired additional personnel.

He has to share materials with the other elementary school, particularly test materials which holds up his teaching schedule at times.

He feels one-half of the job of resource specialists is "public relations." He feels that he is good at getting the staff support he needs for his program. He is most satisfied with the success and growth he sees children making in the resource specialist program which he judges by their rate of return to a regular classroom on a full-time basis. He feels very effective because he keeps teachers happy by his flexible scheduling of children in the resource specialist program. He mixes disabilities in his groups and has children work with each other in order to maintain flexible scheduling as well as improving pupil's skills.

5. Useful Experiences/Training for Present Position

He felt that the training he received through formal education was "useless" for his work as a resource specialist. His training on-the-job in behavior management was most helpful. Additional training that would help him now that he has been on the job for awhile would be in the area of testing--both in administration of tests as well as in interpreting them.

Training areas he would recommend to someone just entering the field would be: testing, behavior management, and understanding specific disabilities.

He is aware that there are changes in the certification requirements of the resource specialist position.

6. Recommended Changes

He said he would like to see a larger physical space for the resource specialist program. It is too cramped and there are too many people in there at once.

He feels the needs of handicapped pupils in his district are being met very successfully at present.

B. Others' Perceptions

Principal - He reported that, "resource specialists are hard to come by..." (This may be a reflection of increasing enrollment in this district.) The principal also said that the "district hires specialists." (Principals apparently have limited influence on the selection of this type of staff member.) He perceived the program to be worthwhile and saw the sharing of resources between resource programs and categorical programs as beneficial. He also noted that one resource specialist was so well received that he was elected by regular teachers to be on the school improvement committee. He called him a "leader on campus." This resource specialist had been here only two years and already "established a firm hold" according to the principal.

Teacher (Site 1) - He sent a few students to the resource specialists this year. He worked with the resource specialist last year...and the program was excellent. "We had common goals and it made a difference with children," he reported. He wished more kids could get in. The former resource specialist, when discussing student problems, used to tell this teacher that "students will outgrow it." His formal contact with the resource specialist is infrequent but they are in the same carpool. According to the teacher, this resource specialist provides visual tracking and motor skills. After resource he noticed a "difference in students' work and in their attitudes about themselves." One of his comments was that "no one has in-serviced them (teachers) on identification and procedures..." He said that "he didn't know exactly what to do" and there are now five new teachers, indicating that they may not be very familiar with the process either.

Teacher (Site 1) - He said he had no problem in getting students in the resource specialist program and noted a difference academically as well as in behavior. He had daily contact, on an informal basis, with the resource specialist and discussed children with him. This teacher saw a need for bilingual specialists. He also mentioned the previous specialist as inadequate because students were not helped. He did feel that the resource program was not providing psychological help and directing enough attention to learning disabilities. He also quoted the former specialist as telling him "students will outgrow their problems." According to his perception, the resource specialist provides little staff development and contact with parents.

Site 2

Site 2, an intermediate school, contained grades 4-6. This school's population was 20% black, 35% Mexican and the rest were lower class Anglo students. It had been mostly black in the past. Three hundred fifty pupils came from AFDC families. Five hundred forty-five students were enrolled.

Resource Specialist II

A. Self Perceptions

1. Present Assignment and Past Experience

Recently selected as a resource specialist, he had been in the position around 2 months. He had been a Special Day Teacher for 2½ years. This resource specialist possesses an elementary teaching credential. He had been a math major. His schooling was interrupted, and when he returned to get a degree he went into special education. Teaching EMR adults at a junior high school got him interested in special education.

He wanted to get into the resource program because "I can reach more children." "I didn't like to see them in Special Day Class."

His most helpful experience was "being a substitute teacher."

2. Activities

His work assignment is to instruct students, attend meetings, test students and talk to teachers. He believes that 3/4 of his time is spent on instruction and ¼ attending meetings and testing. There is a minimum day every Tuesday afternoon, so children in the afternoon do not get instruction. He does get caught up on paper work. He is "caught up if children are absent."

He did not deal directly with the questions, especially if there was any indication of difficulties. Some problems did emerge though. When asked about how he dealt with teachers, his response was "very gently." Tension between this resource specialist and the teachers was evident by comments from teachers. He said he believed it a good practice to have teachers in on the writing of an IEP. But then he stated that you "stick with the IEP, but listen to what the teacher says." And he added, "we are equipped to deal with any problem the child has."

3. Job Definition

His supervisor is the principal. When asked how he decided what his responsibilities were he responded, "I don't do anything without meetings." "I have to do my job right; the principal comes in quite a bit...he's good about that."

4. Efficiency/Effectiveness

No information.

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

He saw no major problems...except a need to work with teachers on scheduling. (Teachers also saw scheduling a problem...they felt this resource specialist was inconsiderate in his lack of concern for a teacher's schedule.) He did not see an overlap in his work.

He saw parent involvement and specialization as "unique" to the position and stated that this program "fits in very well with school in general." When asked about EFFECTIVENESS, he responded that "we are good with disabilities and handicaps." "I can't see anything here that is weak...as long as students come to school everyday." There was nothing he felt needed changing, but again he referred to his "problem with scheduling."

Resource Specialist III

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has been working in his present position for 5 years. His other work experience that relates to this position includes one year working with handicapped pre-school children, two years substitute teaching in special education classes, and an internship in a language clinic.

This resource specialist has an EMR credential, an LH credential and a standard elementary credential. He felt a perceptual motor training workshop by Bellgau and work with the psychologist at the school who helped him formulate learning plans and ideas for reading programs, provided valuable training for his present job.

His work assignment is a roving resource specialist. He goes to the other elementary school part-time. His caseload at Site 2 is 16 students.

2. Activities

Referral - These are given to the principal first. The resource specialist gives advice to teachers on whether or not to refer a child. This requires about 15 minutes a week of his time.

Assessment - This is done mostly in academic areas by the resource specialist. It requires 3 hours per week.

Instructional Planning - This is done in the IEP meeting with the presentation of results of assessment as part of the meeting. Those present include the resource specialist, parent, teacher, administrative representative and at times the nurse or speech therapist. Occasionally the student is included as well. This takes about 3 hours per week.

Placement - This happens at the same meeting as instructional planning mentioned above.

Instruction - This is direct instruction with children on a pull-out basis and requires 21 hours a week of the resource specialist's time.

Student Review - This is done by the resource specialist on an ongoing basis as well as formally once a year for each child. This requires about 2 hours a week of his time.

Program Review - This is done on a continuing basis in conjunction with student review, as well as formally once a year with the superintendent. The time on this activity is not a weekly amount separate from student review (above).

Program Development - This is a form of consultation, approximately 45 minutes a week with regular classroom teachers about ideas for programs to use in the classroom with children who are in the resource specialist program as well as those who are in the regular class program. This resource specialist estimates that he gives advise on about 20 additional children, beyond his caseload, a week.

Staff Development - Not done on any formal basis. Done informally as described above under program development.

3. Job Definition

This resource specialist says he has no job description that he is aware of. He is accountable to the psychologist who is the director of special education services as well as to the principal of the school. After the time on the job that he has had, he gets no instructions from anyone. Originally he received instructions from the psychologist mentioned above.

He determines the whole program after the IEP is written. All of his activities and schedules are determined by him. He does not know whether his work is similar to the resource specialist at the other school but knows they both work on correcting children's learning disabilities.

4. Efficiency/Effectiveness

Because of his unstable location, he feels it has been difficult to maintain an efficient program. He has been in five locations in the school in five years.

Teachers are sometimes resistant to his suggestions and do not comply, so his impact is limited. One teacher out of 21 will not refer children to the resource specialist program.

He tries to make his work overlap with the work of the classroom teacher. Having the students do the math and reading of the regular classroom as well as some remedial work, the resource specialist can guide their activities to help them work up to grade level. In this way the students do not miss any classroom work. The aide works individually with students on reading.

One advantage he has is the use of the district Special Education director's secretary to do his scheduling, letter writing, calling, etc. This secretary also does this for the resource specialist at Site 1.

He feels he is effective in the areas of working with academics and learning disabilities as well as working with children's attitudes about themselves and their work.

One barrier, already mentioned, is the problem with teachers who do not make full use of the resource specialist's suggestions. They also do not coordinate the child's daily program in the classroom with the RSP.

This resource specialist really enjoys his work, especially the direct instruction with children.

The resource specialist aide worked directly in the classroom last year and due to the help the groups became larger since teachers added children to them. The resource specialist aide works in the resource specialist room exclusively this year.

5. Useful Experiences/Training for Present Position

Direct contact with children in his training helped him most during his early years as a resource specialist. The testing instruction from the psychologist was also helpful and more useful than the testing courses he had in his formal education.

For someone entering the field he recommends an internship that teaches the use of materials and the instructional techniques required in the position. The courses should be ½ theory and ½ practice.

Learning about "handicaps" was useful, but theories of child development were of less value because as a student an individual is isolated from the field and doesn't understand how the concepts are applicable. He felt much of the training did not transfer to the classroom.

6. Recommended Changes

He was satisfied now that his working area has become stable and is large enough to be adequate. He never mentioned the problem with the referral process being so slow (and the others who did mention it were interviewed after I talked with him. There was no opportunity to follow-up this problem.)

He recommended training in the remediation of learning disabilities because the disability needs to be addressed before academic work can be successful.

B. Others' Perceptions

5th Grade Teacher (Site 2) - He believed there was one strong resource specialist in the school. The new person has a "communication problem," this teacher reported. "He doesn't consider the needs of a classroom teacher, and is especially inconsiderate when it comes to interrupting us. He does not concern himself with our schedules. There is something about his personality which puts the teacher on the defensive." This teacher did not send a child to resource because of the poor relationship with the resource specialist.

Resource Specialist Aide (Site 2) - He was in the same room working with a student and it was hard to interview him with his superior present. He was a high school graduate who substituted the previous year for the psychologist's secretary (the psychologist had run special education in the district). The aide set up meetings, knew what was happening, and had some training in reading. When asked about the program, he said that "everyday he sees some improvement." (He was also more alert, brighter and responsive than the resource specialist.)

Resource Specialist Aide (Site 2) - He feels the efficiency of the program would improve if the referral time was shortened. Teachers are apparently reluctant to refer children because they feel the child will not get the needed attention soon enough to be of any real help.

Regular Class Teacher (Site 2) - Feels he would refer children more often but the process takes too long. He does get useful ideas from the resource specialist to use in working with children who have problems.

Bilingual Teacher - He would refer children to the resource specialist program if he had someone who he felt needed to be in it.

II. PROGRAM SPECIALIST

A. Self Perception

1. Present Assignment and Past Experience

This program specialist's workload consists of all autism programs in the county and all special classes and resource programs in the consortium. In the consortium of local districts he is assigned to, there are fifty resource specialists, fifty special day classes and fourteen or fifteen autistic programs.

He taught SH children for four years. "He did everything." He trained with LH students and administered an SH program. He holds an administrative credential, standard credentials and LH and SH credentials.

His most useful outside experiences were in the area of staff development. Working for a well known specialist in the field was part of this experience.

He received his LH credential from the county office. During the first year of the Master Plan there was special training, "skill building." This training was needed because "in the field, a program specialist could be eaten alive by the district."

2. Activities

This program specialist views himself as an "expert on the Master Plan." He uses "theater" to teach skills. He "dramatizes" Master Plan issues as part of inservice presentations. His work involves direct teacher contact when providing materials, modeling and answering questions.

He consults and works with administrators to provide support for programs. His contacts are primarily with principals, superintendents, and special education directors.

He does in-services and staff development with emphasis on awareness of the Master Plan and appropriate skills for implementation. He does in-services when requested. When interviewed he was preparing an in-service for junior high school and high school special day class teachers.

He has worked on special projects such as writing a parent handbook, teaching sign language to administrators and educating parents and school staff on mainstreaming.

He "trains and teaches parents to disseminate information." Another role he assumes, is sitting as the administrator at EAS meetings.

Twenty percent of his day is on the road. Last year one school took one hour and forty-five minutes to get to.

3. Job Definition

No information.

4. Efficiency/Effectiveness

Sixty to seventy percent of the job is "scheduling." The amount of time is limited and the work is "rarely done." The territory is so big it is difficult to "provide services or follow through." Teachers have to take responsibility under these circumstances, according to the program specialist.

"Administrators are scared of getting involved with special services. There are competing levels" (i.e., district director of special education). A need for management and communication with teachers and administrators exists and several districts have hired their own program specialists. "They respect you or hate you from the county."

This program specialist considered his role as indicating he was an "expert in writing objectives." He stated that "parents trust us." Although he called himself an "advocate for parents," he did not "direct parents to alternative programs." "I am teacher oriented, not an administrator...I do not evaluate teachers," responded the program specialist when further questioned about his effectiveness.

The "main job requires 'diplomacy,'...sometimes negotiation, personality, and ability to communicate responsibly with people," according to this program specialist.

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

This job has "a lot of flexibility...variety...wonderful support from the curriculum coordinator." "There is creativity." "I would like to see changes in high need areas." Teachers, new or older, need skills. There is a lot of "role confusion and diffusion."

He calls himself and other program specialists, "change agents." "We have influence." "Administrators are the legitimate authority, but a program specialist creates the best situation for kids."

B. Others' Perceptions

Special Education Coordinator - The program specialist was hired by a consortium of five elementary districts and a junior and senior high. The special education coordinator has "a great deal of contact with the program specialists for curriculum and diagnostic needs." "They operate on a demand basis." They provide in-service for regular and special education classroom teachers. "They have a lot of territory to cover." This SESR is short 4 program specialists. Program specialists "carry no authority without superintendent's support."

A new program specialist had been hired to serve the consortium and the director said this program specialist "is involved in curriculum and in-service." The former program specialist "took on administrative duties and acted as an administrative designee." Now the special education coordinator operated primarily in the area of "compliance."

Principal (Site 1) - "I called up a program specialist three weeks ago and haven't heard yet...I wanted to work out a procedure for mainstreaming."

Teacher of Physically Handicapped - The program specialist was new and she had no contact with this person.

Principal (Site 2) - She did not have much use of program specialists. "Last year they clarified regulations. The Master Plan was piloted in this district and we did not need a program specialist," she reported. The consortium special education director advises the principal on the Master Plan.

SPECIAL EDUCATION SERVICES REGION #4

SESR #4 possesses the following characteristics: it is an urban area, and a Consortium with one year in the Master Plan. Program specialists are required to have a Pupil Services Credential.

Two interviewers spent one and one-half days interviewing twenty school personnel on two sites and by phone.

I. RESOURCE SPECIALISTS

Site 1

Site one is an elementary school, located in a middle-to-upper-middle-class community. It is a K-5 school with an enrollment of 500-600. Interviews were held with the director of Special Education from the district and school personnel. The principal, a resource specialist and her aide participated. Others interviewed were two regular class teachers, one teacher of the Learning Handicapped, one parent of a child enrolled in the Resource Program, and one speech and language specialist.

Resource Specialist I

A. Self Perception

1. Present Assignment and Past Experience

At the time of the interview, this resource specialist had been working in her present position for five to six weeks. Prior to this, she was a Special Education teacher for eight years (one year in an EMR class). She has an M.A. degree in the Education of the Mentally Retarded and a California SED Credential.

She was assigned to students in grades kindergarten through fifth grade.

2. Activities

This resource specialist's time breaks down as follows:

a) Approximately 12-13 hours/week spent in direct instruction (i.e., 5 hours/week pull-out, 7-8 hours/week group or individual instruction within classroom). Her aide, under her supervision, does the majority of the pull-out instruction.

b) Approximately 10 hours/week on assessment (i.e., academic testing, observations (approx. two hours per day) and consultation (mainly with speech therapist but some with psychologist and members of guidance team, for example, principal, nurse, speech and language specialist).

c) Approximately 5 hours/week on instructional planning (i.e., organizing materials for her aide to use in pull-out and feeding supplementary materials to regular class teacher).

d) Approximately 2½ hours/week hearing referrals as member of guidance committee (also on the committee are principal, speech and language specialist, and the nurse). They hear regular classroom teachers' and parents' concerns regarding students, make recommendations for modifying environment, curriculum, etc., or agree to carry out full assessment if needed.

e) Some involvement in in-service - so far this year it's been to regular staff about the distinctions between a guidance committee referral and a special education referral.

This resource specialists has only been at this school approximately 5-6 weeks when interviewed. She had already worked her way into the classroom and was doing the majority of her instruction with students there. At first many teachers were opposed to having her present, but she had convinced most to give it a try.

3. Job Definition

No information.

2. Efficiency/Effectiveness

This resource specialist feels one problem which the special education staff and she have encountered that inhibits efficiency is the lack of communication among them. Sometimes more than one person will end up doing an aspect of the assessment work, and other times something will be overlooked entirely by all members. Since they have begun taking minutes of the meeting, this problem has decreased. Another problem she encounters is the regular staff's lack of acceptance of special education. She blames special education staff for this problem. She doesn't think they work hard enough to make special education appealing. For example, she says the policies (e.g., determining eligibility criteria) as well as the terminology and the forms keep changing too often. She also thinks that special education people tend to be too "band-wagoney." "One year they're all hepped up on one program theory, the next year it's another." She says their credibility is suspect because of it. Another problem which she doesn't feel is the fault of the school special education staff, but in fact inhibits their efficiency, is the regular staff's assumption that all the rules regarding special education procedures are made by special education personnel. She feels that the special education staff frequently suffers the brunt of the criticisms and frustrations that the rest of the staff feels about special education in general. This resource specialist feels that there is still a lot of public relations work that needs to be done in special education, that its reputation for being the dumping ground for students and staff has not yet been cleaned up.

This resource specialist sees herself as being most effective in a consultant role (e.g., as a member of the guidance committee which hears teachers' complaints/reports about students and gives suggestions for remediation). She also believes that by spending time in the classroom rather than working one-to-one with student in a pull-out program her effectiveness is increased (for more details, see above).

Conditions which inhibit effectiveness, such as lack of communication among guidance committee members, the unfinished P.R. work for special education, etc., have been stated above.

She feels that by working this way she gets a real sense of how the child is learning, and what the conditions of the classroom are. The teachers have an opportunity to observe her methods of teaching and managing behavior. She can observe the teacher and give feedback to them. The children's day is not as disrupted as it would be if they were in a pull-out program, and the stigma of being a "special student" is not so great because students never have to leave their room. She also frequently helps other students besides the ones assigned (she is seen as everyone's helper).

5. Useful Experiences/Training for Present Position

This resource specialist feels that her classroom teaching experience has been most useful to her in her present work. Currently she'd like to get more instruction (i.e., in-service through the consortium) on testing and through her contact with other school specialists (e.g., speech and hearing therapist, etc.), and pick-up information in their specialities on an informal basis.

To anyone considering a career as a resource specialist, she'd recommend they have a lot of background in Special Educaion and an ability to be able to work well with other people.

6. Recommended Changes

This resource specialist would like to have more time than she has to do her work. She thinks that to better meet the needs of handicapped pupils, there should be much more counseling offered.

B. Other's Perceptions

Principal - The principal feels that the resource specialist's major role is to help integrate special education and regular staff. The principal thinks of her as a partner in changing attitudes towards special education (through inservice, consultation, etc.). She strongly supports the resource specialist working in the classroom, especially because she thinks the resource specialist models good teaching techniques for teachers.

Guidelines change too rapidly (e.g., qualifying students for programs). She thinks staff needs more time to establish themselves before making changes. She thinks they spend all of their inservice time learning about the newest legal regulations and haven't gotten much past this point.

Regular Class Teacher - The resource specialist has observed her students and given her assistance in planning for her students' needs. This teacher feels that some of the greatest help she's gotten from the resource specialist is reassurance that she is already doing all she can for a particular child. She said that initially she was panicked about mainstreaming special education students into her class, but that the resource specialist allayed many of her fears by giving "expert" help. She said that psychologists and principals were not sufficient in the past to give this help. The psychologists, in particular, was too theoretical and sometimes gave "off-the-wall" advice.

Regular Class Teacher - Initially, this teacher was very opposed to having resource specialists work in her class. But her feelings have completely changed. She thinks that because the resource specialist works so intimately with the students she's developed a personal feeling for them. When she and the resource specialist discuss the students, they have a common grounding (i.e., the child in that classroom). She believes that this resource specialist has high expectations and follows through on her expectations of students (i.e., when she's asked a child to do a certain amount of work she checks up on the child and sees that it gets done).

LH Teacher - This LH teacher doesn't have too much contact with the resource specialist except concerning resource specialist program students being considered for placement in the LH class. This LH teacher thinks that in the past, resource specialist program students were missing out on too much class time because of the "pull-out" system. She thinks the program is much better now that most of the work is done in class.

Parent of 5th Grade Boy in the Resource Specialist Program - The resource specialist has helped her understand her child's weaknesses as well as providing suggestions for homework and home modifications. She thinks it has been very helpful to her to be able to have continual informal (as well as formal) communication with the resource specialist. She could recommend no changes.

Speech and Language Specialist - The resource specialist and speech and language specialist have "constant contact" (e.g., guidance team; consulting about students placed in both SH and resource specialist program; trying to coordinate auditory processing program design (auditory/attentional skills)). She thinks the qualities that make this resource specialist so successful are her visibility with teachers and students (i.e., working directly in classes), her strong special education background, and her supportive manner.

Special Education Director - Meets monthly with the resource specialist. Feels very satisfied with the resource specialist's work. Thinks that since the creation of this role (and that of the program specialist), the quality of education has improved, the range of offering for special education students and others has increased. She does not feel that these roles could be replaced.

Summary of Other Perceptions

The distinctive feature of this resource specialist and the way she operates her program is in her high level of involvement in the classroom. Teachers and others appreciate her support, her sincere concern and familiarity with the children, all made possible by her coming into the classroom. She has provided a model to teachers and has made it possible for students to get the help they need without having to leave their class and miss any classroom activity.

Student Review - In the spring, Form B of the Brigance Inventory of Basic Skills is administered by the resource specialist as a post-test.

3. Job Definition

The vice-principal and department chairwoman for the resource specialist program are this resource specialist's supervisors. The vice-principal does a periodic evaluation of the resource specialist program staff. At the time of the interview, she was completing an evaluation form given to her by the vice-principal in which she had asked her to state her goals for her students and how she would implement instruction in order to attain them.

Instructions she receives from her department chairwoman are in the form of request for testing. She is also given other directives, such as the subject areas she will specialize in and school procedures to follow. The way she allocates her time and delivers instruction is left up to her.

4. Efficiency/Effectiveness

There are two major problems which this resource specialist encounters in her work. One is that because it is a large school there are many different people involved with a single student. Frequently the files on students get misplaced and this resource specialist doesn't receive word about a student she is to see until much later than she should, or she expects a student to be in her program and the student hasn't been informed about his/her assignment to the resource specialist program.

A second problem with the resource specialist program is that resource specialists are assigned to teach specific subjects which they may or may not enjoy teaching and/or have much expertise in. She says that in some cases the students obviously suffer under this system and it is frustrating to teachers.

This resource specialist thinks she's most effective in helping students develop more self-confidence. She finds working with Level IV students most satisfying because they generally want the help she offers them and catch on relatively quickly. What she finds more frustrating is working with Level I students who are terribly discouraged and uninterested in learning.

5. Useful Experiences/Training for Present Position

Her experience as a classroom teacher and mother has been most useful to this resource specialist in her present work. Now she'd like to be getting some on-going training which she could apply in her work (e.g., how to do better assessment, instructional planning, motivate students, etc.).

Experiences which she thinks are very helpful to anyone considering a position as a resource specialist include regular classroom teaching and an integrated college program in Special Education combining theory and application. She thinks that too much of the training is too theoretical.

6. Recommended Changes

This resource specialist feels that she's too new in her position (approximately two months) to know whether or not there are any changes she'd like to have in her work, although she can see already that more time to do her work would be nice.

This resource specialist did feel that there was a distinct improvement in the relationship between specialists and regular classroom teachers. "Last year when the program was new there was some reluctance to cooperate on the part of regular classroom teachers. Now 95% are cooperative."

Resource Specialist III

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist had been an industrial arts teacher for sixteen years. She worked with handicapped students on special projects and when they started to cut programs she decided to work in the special education area. (This is a declining enrollment district and specialists are not laid-off and are not on the same type of seniority list as are regular classroom teachers.) This resource specialist needs 18 more units for an LH Credential and 15 more for Pupil Personnel Credential.

2. Activities

She spends the majority of her time teaching social studies. She has two groups. Level I students are seen daily. Level IV students attend regular classrooms and come to resource once a week. She teaches Level IV students social studies, math, science and English. Social studies classes are self-contained and 50 minutes long. She has four classes a day and a testing period. An open period is used for visiting.

The number of students change frequently. Currently there are 16 in Level I and 22 in Level IV. More are added by counselors as the need arises.

This resource specialist writes behavioral objectives for students after assessing (uses Brigance and WRAT). Students are assigned to resource specialists on the basis of subject areas they need to work on. There is a three week evaluation of the students. Resource specialist III also developed a "review procedure," where every six weeks the classroom teacher checks the student's progress in his or her subject.

3. Job Description

No information.

4. Efficiency/Effectiveness

One of the problems with the program is Level IV. Five or six students are taught at the same time, and although the aide is excellent according to resource specialist III, it is difficult to conduct classes in this manner. Truancy can also be a problem for a resource specialist working with Level IV students, since students report to regular classes before they go to resource for help. The resource specialist does not know if the student is in school.

This resource specialist did feel that there was a distinct improvement in the relationship between specialists and regular classroom teachers. "Last year when the program was new there was some reluctance to cooperate on the part of regular classroom teachers. Now 95% are cooperative."

Resource specialist III introduced a three week evaluation form which may contribute to greater efficiency and effectiveness in terms of student objectives.

5. Useful Experiences/Training for Present Position

Her experience as a classroom teacher and mother has been most useful to this resource specialist in her present work. Now she's like to be getting some on-going training which she could apply in her work (e.g., how to do better assessment, instructional planning, motivate students, etc.).

Experiences which she thinks are very helpful to anyone considering a position as a resource specialist include regular classroom teaching and an integrated college program in special education combining theory and application. She thinks that too much of the training is too theoretical.

6. Recommended Changes

Ths resource specialist feels that she's too new in her position (approximately two months) to know whether or not there are any changes she'd like to have in her work, although she can see already that more time to do her work would be nice.

B. Others' Perceptions, Resource Specialists II and III

Psychologist - She has contact with the resource specialist program staff in these ways: helps with assessment; gives suggestions for remediation techniques and group instructional planning; does some staff development for them and may meet parents together with a resource specialist.

The psychologist feels that since the introduction of the roles of resource specialists and program specialists under the Master Plan, there is greater attention given to special education students (e.g., teachers have become more aware of problems and procedures for remediation due to the assessment work that is being done and the IEP). She also thinks that communication between home and school has improved. In addition, she believes that because more trained people are doing assessment, for example, the resource specialist and program specialist, more information about students' problems and needs is available.

The suggestions that she makes for the resource specialist program staff are that they improve their organization so that more small group or individual instruction could take place. At present, she doesn't feel that the students are getting enough attention.

Teacher of the Learning Handicapped - Her contact with the RSP staff is limited to communication about a few students who are placed in both the LH class and the RSP.

She thinks that since the introduction of the resource specialist role, students are given a better chance at being mainstreamed. Until resource specialists were present, there was no place for a student who was at a higher level of functioning than the LH student but at the bottom of the regular class. For this reason, she thinks their role is essential.

Speech Therapist - She feels the RSP is primarily tutorial and makes her work harder. They are not therapists.

Special Education Department Chairman - She believes more remediation was needed with some students now in the resource specialist program. She believes the resource specialist should handle only students who can be successfully mainstreamed.

Program Specialist - She defined the resource teacher as a person who monitors students in regular classes. The program specialist does in-service (both formal and informal) for resource teachers, attends IEP meetings with them and informs them about SB 1870.

Site 3

Site 3 is a high school with similar demographics as Site 2, but has operated under a principal who introduced Master Plan objectives many years prior to legal implementation.

An interview was conducted with the resource specialist by phone for the purpose of contrasting activities at Site 2, which had been in the Master Plan for only one year, with Site 3 where mainstreaming had been supported for a number of years. Unlike Site 2, where resource students were located in barracks, the program was conducted from regular classrooms in Site 3. These classrooms were still somewhat isolated, however.

Resource Specialist IV

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist is in her sixth year in the special education area, and her second year at Site 3. She was a reading teacher in a special education program before getting her LH credential. She also worked in a private clinic for two years diagnosing disabilities.

2. Activities

Resource specialist IV said that the Site 3 program tries not to pull students out of class and a first priority is to work with regular classroom teachers in order not to pull-out. "Resource programs give us flexibility." "Students can drop-in. Trust has developed over the years."

She spends most of her time instructing. At least 3 hours a day are with students. Periods 2 and 5 are drop-in periods. Additional responsibilities involve: consulting with regular classroom teachers amd modifying curriculum, and assessing as part of screening committees which review referrals and handle transfers. Resource specialists are case carriers. They do academic work, and tests for handicapping are ongoing. Resource specialists assess continuing students; two tests are given in each academic area and two tests in each handicapping area.

A resource specialist is a counselor according to resource specialist IV. They provide a liaison with the family and administration and take care of program changes. The school counselor handles all discipline and attendance.

There are nine people working in the program, six in the resource program and three as special day class teachers. Of the over 3,800 students in the school, 160 are in the resource program. Thirty-five are in special day classes.

Resource specialist IV felt the job was satisfying because of student success. With intermittent assistance, the resource specialist program prevented student failure, ended tracking, and improved a student's self concept. The job's frustrations were a result of time constraints, the number of regular classroom teachers needed to be contacted (over 80 teachers), and the lack of a good supply of traditional aides. They had to hire college students because of the scarcity of money.

4. Efficiency/Effectiveness

No information.

5. Useful Experiences/Training for Present Position

No information.

6. Recommended Changes

No information.

II. PROGRAM SPECIALIST

One day was spent interviewing and observing the program specialist at work.

A. Self Perception

1. Present Assignment and Past Experience

This was her second year as a program specialist. Previously she worked as a speech and language pathologist. She worked in a high school for five years, and currently teaches part-time at a state college. She also has a private practice in speech pathology.

This program specialist has a B.A. and M.A. in Communicative Disorders from a state college and a certificate of clinical competenc in addition to the "standard credentials."

2. Activities

Her territory is the entire high school district and post secondary programs. This covers six schools and the guidance center. She does approximately two hundred observations for six students in private schools.

She estimated that 10% of her time was spent on PRIVATE SCHOOL PLACEMENT. Two or three times a year she checks on the students' progress. November 1st begins visitations. "70% of my interaction is with teachers and staff, 30% is with agencies and parents."

She is also responsible for overseeing nine aphasia teachers, 9½-10 speech and language specialists and 10-12 teachers of the severely handicapped.

Her activities as a program specialist involve Monday visitations to the guidance center and Tuesday through Thursday scheduled on the basis of established needs.

Her day begins at 8:00 a.m. She goes to the RLA office and spends the first hour on phone calls. Then for four days of the week she is in the field doing consultation and assessment, both formally and informally. During this period she may also make private school visitations. Normally the workday ends at 4:30 p.m. when she returns to the RLA center. Friday is devoted to weekly staff meetings which include the staff members familarizing themselves with new forms, procedures and changes in the law. Friday can be used to prepare materials.

This program specialist is a consultant for IEP meetings. When a new teacher is involved, the program specialist may be called upon to write the IEP. She reviews the IEP, and particularly the parent option. "I assist in the review of difficult cases when parents refuse to sign the IEP or appropriateness is called into question."

The program specialist also conducts review on a semester and annual basis. "I assist in review." If students are still in Special Education by high school, they have severe problems. "I review students' past history. If students are in an LH class and not progressing in this class, they could be placed in CH class, which might be more appropriate."

"Placement usually is the source of our problems." It (conflict) "could have been resolved if alternatives" were handled more "thoroughly." "I try to discourage shopping around. I encourage placing a child in his/her attendance area. Newer staff will call for help on placement. I am aware of available programs." She knows more than just her specialty because structural complications in secondary schools calls for "cross category placement." "WHAT IS UNIQUE TO MY JOB IS THE AWARENESS OF RESOURCES AT THE DISTRICT LEVEL."

She believes the consortium provides in-service to weaker programs, "one school doesn't get the cream of the crop." 95% of the students are placed in their attendance area. Prior to the Master Plan there was a disparity in curriculum. Now services are consistent from one campus to another.

There were a large number of private school placements prior to the consortium, according to the program specialist "Parents in this district are now more knowledgeable." At present there are workshops with parents. Two community advisory committee workshops were put on last year. This program specialist has at least five parent contacts a week, at least one a day. She generally discusses what "services are available."

This program specialist was asked by a high school vice-principal to review the objectives of a special education teacher. The program specialist did not seem unduly disturbed by the request, but handled it as one means of "access" and rapport with administration.

3. Job Definition

This program specialist operates under general guidelines of the law, her specific job description, and particular assignments. The guidance center is specifically assigned as is "monitoring" a speech therapy internship program twice a week. This assignment was made by the districts in the consortium. Otherwise, case requests determine her schedule. She has to do program observations, attend IEP meetings and reviews. She is called in for consultation and assessment.

The line of authority ranged from the director of Special Education for the district (this program specialist's immediate supervisor) to the assistant principal, teacher and/or specialist and parent, according to the program specialist.

4. Efficiency/Effectiveness

The program specialist suggested that some of the problems that impede efficiency are a consequence of the complexity of the high school system, funding, and lack of time. She said "elementary schools were easier." Elementary districts (and schools) are smaller and have fewer "political ladders." Most of the cause of conflict is funding, according to the program specialist. Caseloads are too high and budgets are limited for supplies and materials. There is less money for direct services as well as a "lack of funds for professional development." A continual complaint of the program specialist was her $200 annual allowance to "attend workshops, subscribe to professional journals, etc..." She seemed to feel this curtailed her professional growth and impeded her effectiveness.

Another problem she spoke of was "lack of time." She has fifty-two square miles and six schools to cover. She noted that some program specialists had twenty or thirty schools. The high schools in her territory, however, averaged a high number of approximately 4,000 students.

Other problem areas this program specialist identified were duplication of in-service programs; "simultaneous demands," or request for some services at the same time; and "county meetings that overlap," or cover the same material.

She reported, "the hardest aspect of this job is different educational philosophies." Working under one umbrella can impede efficiency. The nature of the liaison position, according to the program specialist, impedes effectiveness. She noted that "...administrations will resist directives...I AM AT TIMES AN OUTSIDER." She continued, "I work with administrations and give suggestions, but I am least effective when the administration is not open to approach." "Trying to work with local administration makes it much harder." The role of specialist is a "legislative role," we can show how to do IEP in cases where we have administrative support. An assistant principal wears "lots of hats." I have been told "you tell my teachers, you evaluate my teachers..." A program specialist "is looked upon as an administrator." We are "experts in curriculum, not administrators." It "is hard to be a specialist in all areas...impossible to stay abreast of all curriculum changes...hard to perform a dual role." We were "set up as curriculum consultants, and trained as curriculum consultants." "This is the function that generates respect and greater appreciation for services. Compliance forces an administrative role. Teachers blame me for no money."

Another problem is that there is a need to in-service administrators." "I enjoy interaction with teachers, but this position is not as rewarding as teaching." Not much positive feedback...complaints about how poorly things are run. She hears complaints about "90% of the time." "Not much support," according to this specialist.

To be more effective would require additional time on site and an increase in direct services to specialists. There is a need for more release time for special education teachers. More money is needed to attend speech pathology and other conferences and workshops, as well as travel.

This program specialist felt that she had received as much formal training as was available in her area. Additional money for conferences, workshops and reading material, or "informal" means of professional growth were more important to her.

5. Useful Experiences/Training for Present Position

She felt her experience in a hospital setting provided her with more "intensive" background in the clinical or therapeutic aspect of her work. The clinical experience helped her learn to use a "TEAM APPROACH" in public schools. It is more effective because of large caseloads and lack of time.

6. Recommended Changes

No information.

B. Others' Perceptions

Nurse - A program specialist is "part of a regulatory agency...someone who monitors what we do...has very little contact with kids directly. They do not take part in direct evaluation. They evaluate the process, they are redundant. A program specialist has a more complicated job. There are a myriad of forms constantly being changed which they are responsible for. Directions are contradictory. This year they are getting it together. In the past, there has been pressure to identify for sake of identification, now there is no value in it...(CAPS). There are fewer meetings this year."

Department Chairman of Special Education and Special Class Teacher - She had contact with several program specialists. Calls on them depending on strength. They are "good at IEP meetings." They provide in-services on teaching and assessment, go over new forms, attend IEP meetings of a controversial nature. They are "personally excellent, but limited "timewise." Their time frequently can't be spent on their priorities. The program specialist's perference would be to visit sites.

Program specialists are "not terribly necessary." There are alternatives to the way they function now. Under declining enrollment class size has increased, which is a loss for special education kids.

LH Teachers - Contact with program specialist through an in-service on a student. Informs us on the availability of teaching materials. Didn't know what role of program specialist was in providing in-service. They do tie in with other programs, such as resource programs. Sometimes they make decisions about placement of students they do not know well. This distressed the LH teacher.

Speech Therapist - She has a program specialist assigned to her. This program specialist sits in on IEP meetings and presents options in case of placement conflicts. According to the therapist, a "Program specialist is a resource...they plan workshops and observe." She does not use their services. The program specialist is a department coordinator (speech) and handles problems as well as holds monthly meetings.

A Classroom Teacher - She has no contact with the program specialist.

A Counselor - She has contact with a program specialist mainly at IEP meetings. She sees her as a liaison with districts regarding placement. The counselor feels program specialists need more "hands on" experience. They need to be present more and their credibility would increase.

She believes since the introduction of the role more assessments are done. These have value since they target the strengths and weaknesses of of students. She felt others could do staff development equally well with program specialist, but don't have the time.

Principal, Site 1 - She feels that if program specialists get out into the field they can be highly effective. They have been helpful to her and her staff by informing them about the legal aspects of the Master Plan, acting as a community resource, providing staff in-services, etc. She thinks that the resource specialist and program specialist work very well together (i.e., program specialist informs resource specialist about legal guidelines, relieves anxiety, gives testing in-services, etc.) but that the regular teaching staff doesn't understand the program specialist's role.

Resource Specialist II - She thinks that the needs of handicapped pupils would not be served as well without program specialists. She thinks they provide options to teachers by creating, maintaining, and upgrading special education programs.

Resource Specialist III - She uses program specialists. "Anytime I have a problem I call her." "She does an excellent job." I "contact her in curriculum areas. High School materials are difficult to obtain and she knows suppliers." "Program specialist writes behaviorial objectives for students, and attend all IEP meetings."

Resource Specialist IV - She felt "close" to the program specialist. It was her "link to legal interpretations..." The program specialist, "keeps us alive legally," she explained. She felt the program specialist insured consistency of programs in the districts, especially among 8th grades which fed into the high school. Her program specialist also offered a lot of suggestions in curriculum.

SPECIAL EDUCATION SERVICES REGION #5

SESR #5 represents the following characteristics: it is a single urban district, has been operating under the Master plan for two years, and its program specialists are hired on a management contract.

Two interviewers visited two elementary schools in this area, interviewing a total of 17 school personnel. They included: one program specialist, two resource specialists, two principals, one county diagnostic teacher, one district counselor, one school psychologist, two DIS personnel, four regular class teachers, two special day class teachers, and one resource specialist aide.

I. RESOURCE SPECIALISTS

Site 1

Site 1 is an elementary school (K-6) with an enrollment of 500-600. It is located in a middle-to-upper-middle-class community. Fifty percent of its students are bilingual and are bused from outlying communities.

Resource Specialist I

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has been working in his present position for three years. He is assigned to one elementary school. Prior to this he was a volunteer in a reading program; taught church school for 15 years; was a special education teacher for four years; a substitute teacher and parent. He has a master's degree in special education, a standard elementary teaching credential, TMR/EMR and special education credentials and is currently working on a Spanish credential.

2. Activities

Referral - He consults with parents, teachers, and principal regarding referrals and routes them to appropriate personnel (psychologist, speech and hearing therapist, nurse, etc).

Assessment - 20% of his time is spent planning or actually doing assessments (e.g., academic, achievement, sensory-motor); he coordinates the assessment work with psychologists, reading specialist, speech and language personnel, etc. The IEP team determines what tests will be administered and who will do them.

Instructional Planning - He does all of his own planning for the pull-out program and helps teachers plan for children they have in their classes.

Placement - He helps make placement decisions as a member of the IEP Team.

Instruction - 60% of his time is spent giving direct instruction and planning. An instructional aide assists.

Review - He participates in formal review of students (1-2 per year per student) and in less formal reviews through telephone contact with parents, at least once per month.

Staff Development - Conducted on a formal basis one or two times per year and on an informal basis daily.

3. Job Definition

No information

4. Efficiency/Effectiveness

This resource specialist reports no major problems in his work. He says he provides the organization and coordination of all Special Education services for handicapped pupils at his school from the referral through to the review stage. He sees himself as a resource to the staff on many aspects of learning handicaps (e.g., identification, remediation, etc.). The only possible problem is not having enough time to do all the work.

He feels that the new system of Special Education has made educators more accountable for their work, has increased parents awareness of their childrens' education, and has encouraged a team approach in meeting the needs of special students--all this, he feels, is very positive.

5. Useful Experiences/Training for Present Position

In his beginning years as a resource specialist he found the technical information he'd acquired the most helpful to him (e.g., knowing what the different kinds of learning handicaps are; how to identify them; what methods to use to remediate them). He recommends to anyone who is considering becoming a resource specialist that they acquire this same information.

6. Recommended Changes

The only change he'd like in his own role would be to have more time to do his work. In other regards, he thinks that a resource specialist aide position is more demanding than all other aide positions and therefore should be classified at a higher level. Then, more highly qualified people would be competing for positions as resource specialist aides and would be more adequately paid.

B. Others' Perceptions

Psychologist - This psychologist consults with resource specialists on assessment (e.g., suggests additional assessment measures they might use, helps interpret test results).

Before the introduction of the resource specialist program, this psychologist stated that students who were learning handicapped could not always stay in their neigh-borhood schools and regular classrooms. Now, the resource specialist program provides them with the additional one-to-one help they need so they don't have to be removed from their communities and out of the mainstream.

Itinerant Adaptive Physical Education Teacher - This Adaptive Physical Education Teacher receives referrals for assessment from the resource specialist. He consults with him about students who have been referred or are placed in special education programs. He thinks that the resource specialist does a very good job of keeping all significant personnel informed about the status of handicapped pupils.

Coordinator, Adaptive Physical Education - He receives requests for assessments from the resource specialist; conducts in-services for resource specialists on physically handicapping conditions and how to work with them. He thinks that resource specialists are playing a key role in the coordination of special education services at the school level. One suggestion he makes for change is that the resource specialist and the program specialist notify APE personnel of assessments they want them to do, leaving enough time in which to conduct them and determine results. Sometimes, he says, they are given referrals with an insufficient amount of time to complete them.

Teacher of Bilingual Class (grades 3-4) - He gives referrals to the resource specialist and consults with him about students who are having learning/motivation problems. He says that he always gets immediate assistance from the resource specialist. He makes suggestions about classroom management and curriculum materials; discusses with him weekly the students placed in the resource specialist program; sometimes helps with students who were referred for the resource specialist program but refused; does in-service on forms for IEP meetings.

Principal - He feels that this resource specialist is "excellent." The resource specialist is well trained in his field and does an excellent job of detecting learning problems and knows how to remediate them. He also helps regular classroom teachers adapt their instruction for the learning handicapped students. Because the principal feels that the Master Plan has improved services for the handicapped, he is in favor of it, although his workload has increased as a result of it (e.g., attending IEP Meetings and in-services on the Master Plan guidelines).

Regular Classroom Teacher (grades 4-5) - This teacher talks with the resource specialist about referrals. He has several students placed in the resource specialist program. He thinks the recource specialist is accommodating with scheduling students at times so they won't miss out on important class time. This teacher generally feels that services have improved with the beginning of the resource specialist program. He would like to be a little better informed as to what the resource specialist does when he works with students.

Site 2

Site 2, also an elementary school (K-6), consists of student from low-middle class families (e.g., 80-90% on Welfare, according to the principal). A large percentage are single-parent families.

Resource Specialist II

A. Self Perception

1. Present Assignment and Past Experiences

He is assigned to work in two elementary schools, and he has been working in his present position for three years. Previous to that he taught in an LH pull-out program for two years. Total teaching time is 20 years. His educational training that relates to this position includes an M.A. in education, a specialist credential for working with the gifted, a regular elementary credential and a special education credential.

2. Activities

Referral - In the beginning of the year, his activities in the area of referral are very heavy. He receives all special education referrals and coordinates the whole process.

Assessment - The resource specialist conducts testing and coordinates assessment work of other specialists.

Instructional Planning - This is an ongoing activity. In the beginning of the year, instructional planning take a larger percentage of time than later on.

Instruction - Three-quarters of time is spent in instruction. A resource specialist aide assists.

Review - Each Spring he conducts an annual review on each student assigned to the resource specialist program.

Staff Development - He consults with teachers about educational programs for students (resource specialist program and non-resource specialist program students). He also conducts in-services on learning disabilities diagnosis, Master Plan Procedures, and laws.

Parent Education - The resource specialist conducts discussions with parent groups about learning disabilities, Master Plan procedures and laws.

3. Job Definition

He is accountable to the two principals in the schools where he is assigned and the director of special day class teachers and resource specialists who work out of the central office.

He is allowed a great degree of autonomy. The only instructions he receives in his work are given to him at meetings, held two or three times a year for "housekeeping information" such as laws, procedures and criteria.

4. Efficiency/Effectiveness

This resource specialist says his main activity is public relations: developing acceptance of the resource specialist program among the staff and maintaining that acceptance.

This resource specialist feels he is most effective in giving direct instruction to students and also, in helping parents understand their children's needs.

He, however, feels his effectiveness as a teacher is inhibited by two conditions: 1) too much paperwork for the Master Plan, and 2) having to split his time between two schools. With two faculties, two IEP teams, and two aides, the work of coordinating and organizing all these people cuts down on valuable time spent with students.

This resource specialist spoke of an additional problem: enrolling bilingual students in the resource specialist program. "Proper assessment," he said, "is hard to do and it takes a long time to get someone in the district who can conduct the assessment." There are no personnel employed in the special education program who are bilingual. The ESL program does not like having children placed in special education because of the perceived lack of exposure they will have to their native language. As a consequence they rarely refer their students. This resource specialist feels this is unfortunate because he knows some children would qualify for and benefit from the resource specialist program.

5. Useful Experiences/Training for Present Position

The most useful aspect of his training came from assessment courses and his direct experience as a regular class teacher. Additional psychology courses, he feels, would be useful to him now that he has been on the job awhile.

Areas of training he recommends for a new resource specialist are counseling training, discussion leading skills, assessment skills, and experience as a regular class teacher.

6. Recommended Changes

He is satisfied with his work and likes the variety of tasks, but he does not like the limitations of being split between two schools. He thinks that a full-time assignment at one school with an approximate caseload of 18 students and reduced administrative tasks would be the most effective use of his time.

B. Others' Perceptions

Prinicpal - This school just qualifies for a half-time resource specialist. However, he believes the nature of the population requires more resource specialist time due to the problems of this low middle-class group, with 80-90% being on welfare and many single, working parents. The school has had to hire an extra teacher who does tutoring, to augment the resource specialist program. A half-time teacher has less time for direct instruction because of the organizational demands of two separate schools.

This principal says he has less contact with the resource specialist since the Master Plan has been in effect (the resource specialist had a similar role before officially becoming a member of the Master Plan) and knows less about the students enrolled in the resource specialist program. He is only involved at the IEP team meetings.

Since the institution of the Master Plan, he feels that better assessments are being done and that there are better personnel to provide services, in general. However, the amount of paperwork decreases time which could be spent giving direct services to children.

Regular Class Teacher (5-6 grades) - This teacher has had very satisfactory contact with the resource specialist. He has consulted with the resource specialist on remedial techniques to use with students in his classroom. He reiterated the same comments the principal made regarding the resource specialist's half-time limitations and Master Plan paperwork overload.

Special Day Class Teacher - He would ideally like the resource specialist to be able to help with testing of special day class students, but realizes the resource specialist doesn't have enough time.

He feels that handicapped pupils need more counseling services and that more of the psychologists' or counselors' time should be devoted to this need, or the teaching staff should get more training so they are equipped to meet the needs.

This special day class teacher also commented about the problems of having a resource specialist only part-time and the overload of paperwork.

District Counselor - Occasionally, he refers students to the resource specialist program, and consults with the resource specialist about students he sees in counseling and who are also enrolled in the resource specialist program.

II. PROGRAM SPECIALIST

A. Self Perception

1. Present Assignment and Past Experience

This area program specialist is one of 14 working for the district. Each one is assigned to approximately 14 schools. Their major responsibility is to oversee an assessment team which serves their 14 schools and which is made up of psychologists, nurses, speech and language specialists, and diagnostic teachers. In addition to these 14 area program specialists, the district has program specialists who are in charge of specific special education programs (e.g., CH, PH, SH, and LH).

2. Activities

Referral - The program specialist receives referrals from schools either for initial placement in any of the four special education programs (i.e., CH, LH, PH, or SH) or reviews of placements; he holds pre-assessment meeting at which time remediation strategies for the classroom are suggested, and/or a case-carrier is assigned to head assessment.

Assessment - He coordinates all responsible parties (parents, school personnel), reads over documentation, and generally pulls the case together.

Instructional Planning - He recommends teaching materials to special day class teachers.

Placement - When assessment is concluded, he chairs the IEP meeting and takes the responsibility to help the group come to a consensus on a placement decision. He, himself, makes recommendations about placements but does not make the final decision.

Review - Because of time constraints, this program specialist attends only some pupil review meetings.

Staff Development - He is a member of the staff development team which organized the in-service program for the year, but he didn't give any in-services himself.

3. Job Definition

No information.

4. Efficiency/Effectiveness

This program specialist encounters problems when attempting to find satisfactory placements for students because he thinks there aren't enough qualified special education teachers.

Another problem he encounters is when IEP members don't have a "team spirit" and are "uncooperative with the rest of the group." (An example he gave is a psychologist who thinks he knows what's best for a student and who pushes his point without regard for others' opinions.)

This program specialist views himself as most effective in bringing about cooperation among school personnel and IEP Team members, and he feels least effective when he is authoritative and too opinionated!

Generally, he's very satisfied with his work. Eventually he'd like to do more teacher training than he's presently involved in because he thinks that there's too large a percentage of teachers who are ill-equipped to teach special education classes.

In his district, all program specialists are on a management contract (equal to principals). He says that some principals seem to resent the amount of authority the program specialists have, and there are tensions among them.

5 Useful Experiences/Training for Present Position

His past experiences in working with adults and in special education have been most helpful to this program specialist in his present work. At this time, he'd like to be getting more training in management, time-management and learning handicapping conditions.

He thinks the following are important skills for a program specialist to possess in order to be effective: 1) administrative skills, 2) group management, 3) interviewing skills, 4) organizational skills, and 5) knowledge of special education.

6. Recommended Changes

He thinks that the amount of assessment work presently being done is excessive and should be reduced. Instead, more time should be devoted to implementation of instruction.

He thinks that teachers should be better trained to work with students with exceptionalities and capable of altering general curriculums to match individual needs.

B. Others' Perceptions

Principal - His general view of program specialists is quite negative. He says that their view of themselves as a "Child Advocate" offends him. He views himself as an advocate, and thinks anyone who works with children must too, and resents program specialists for thinking they're the only ones on the side of children. He thinks program specialists are in less of a position to be making placement decisions than he or the parents are. Program specialists, according to him, sometimes make decisions about where a child should be placed without even having seen the student. He thinks parents and he, together, could observe special classes and make more informed decisions about what is best for the student than Program Specialists generally do.

In his opinion, the role of the program specialist could be done away with completely. If their job is to continue, he thinks that program specialists should be held more accountable to the schools they serve; they should be less focused on the law and act more as a consultant to principals.

County Diagnostic Teacher - This person thinks program specialists are effective in their roles because of the overall picture they have of district programs, different styles of teachers, and community services. He also thinks that program specialists are the best people to chair IEP meetings because they generally haven't conducted the assessment and should therefore be unbiased.

A positive quality which he feels this specific program specialist possesses is an ability to facilitate communication of team members and assist in their reaching decisions. One of the program specialist's shortcomings is lack of knowledge about assessment.

Generally, he thinks a problem with the way in which the program specialists operate is that they don't have enough time to follow through and see how a child is functioning after the placement has been made.

Regular Teacher (grades 4-5) - His impressions are based on his contact with a program specialist when he was acting principal and as a designer of an IEP team. His perception of their role is that they suggest objectives and goals for IEPs, administer tests, give test interpretations, and help in the adjustments when students in special education classes go from elementary to junior high school.

District Counselor - He has relatively little contact with the program specialist. When he does, it's in order to get background information on children he's working with.

Resource Specialist - He has sought the help of a program specialist but hasn't found it very useful. He feels the hiring of program specialists is political and not a choice based on skill.

SPECIAL EDUCATION SERVICES REGION #6

SESR #6 represents the following characteristics: it is a single district with suburban and rural areas, has been operating under the Master Plan for three years, and its program specialists are hired under both Management contracts (those program specialists who supervise special programs: e.g., CH, PH, SH) or Pupil Services contracts--a teaching salary plus stipend (those who serve LH and resource specialist programs).

Two interviewers spent two days in this area interviewing 16 people. They included: one special education director, three resource specialists, one program specialist, two principals, one counselor, one psychologist, three regular classroom teachers, one speech therapist, one special day class teacher and two parents.

One interviewer spent one day on-the-job with a pupil services program specialist while the other conducted interviews in an elementary school. On the second day both interviewers visited another elementary school.

I. RESOURCE SPECIALISTS

Site 1

Site 1 is a suburban middle-class elementary school with an enrollment of 500-600.

Resource Specialist I

A. Self Perception

1. Present Assignment and Past Experience

This person has worked as a resource specialist for four years: two years at the elementary school level and two years at the high school level. He has also worked as a teacher of the educationally handicapped, as a high school English teacher, and as a teacher of the severely emotionally disturbed in an institution for handicapped students.

His educational background includes M.A.'s in regular and special education, LH and SH credentials.

He currently works full-time in one elementary school and has a caseload of 36 students and four "active" assessments he is working on.

2. Activities

Referral - He receives them directly from parents, counselors, administrators, community members, and teachers. There is an IEP meeting for every referral.

Assessment - This is largely done by the resource specialist and is usually academic, i.e., looking at learning needs. He formulates a summary or academic history of the child. Assessments are done by others as needed (i.e., psychologist, speech therapist, etc.).

Instructional Planning - After the placement decision is made, the IEP team formulates the instructional plan. The resource specialist usually tries to have it focus on two areas only.

Placement - At this school, placement precedes instructional planning. Once placement has been decided, then there is an IEP meeting for planning. The placement meeting has in attendance the principal or vice-principal, the resource specialist, the regular teacher, the student and the parents.

Instruction - This resource specialist determines with the IEP Team what percentage of the day a student will be in the Resource Specialist Program. Three-quarters of his time is spent in direct instruction. This is a total pull-out program.

Review - He does this on a variety of levels: some of it is done daily, some weekly or monthly, plus a pupil-parent conference every 6-9 weeks.

Staff Development and In-service - This is done mostly as informal advice-giving to teachers in the area of curriculum designing and in helping them formulate realistic goals for students with learning handicaps.

Parent Education - The resource specialist has frequent conferences with parents to discuss their children's work.

Counseling - He counsels students on campus and sometimes off campus.

Program Review - The resource specialist meets with the program specialist on a weekly basis to discuss the resource specialist program. The resource specialist conducts a formal yearly review of the entire program.

3. Job Description

This resource specialist reports to the principal, the program specialist who evaluates him, the management program specialist and the RLA director. He has the freedom to determine his own activities.

He believes that his program is similar in design to others in the area, although each varies slightly according to the individual needs of each school.

4. Efficiency/Effectiveness

This resource specialist judges himself to be very effective in assessment (i.e., finding out in what areas the students have weaknesses) and in establishing rapport with his students. However, he does feel he spends too much time with the referral and assessment process and not enough time giving direct instruction to students. He thinks others could coordinate the referral process and conduct the assessment he is now doing.

One other problem he mentioned which inhibits his effectiveness is his case overload. He presently has 36 students enrolled in his program.

5. Useful Experiences/Training for Present Position

This resource specialist feels that regular class teaching is an important experience, for then a resource specialist knows what occurs in a regular-sized classroom from both the understanding of what a teacher can provide and what attention a child can receive.

Now that he is on the job, he would like ongoing in-services in current techniques of direct instruction, to keep up-to-date in his field.

He would recommend to someone going into his field a strong background in the basics: English/writing, math, science, reading, as well as psychology/counseling training. He has to do a lot of counseling in his position as resource specialist. He also stressed the need for training in assessment. Student teaching under a resource specialist would also be valuable.

6. Recommended Changes

This resource specialist felt that the paperwork involved in his position was too heavy and took too much time away from direct service. It often increased his work time beyond the regular day.

B. Others' Perceptions

Principal - He feels that the resource specialist is academically focused and effective in his work. He also feels the resource specialist's effectiveness would be increased if he didn't have to spend as much time as he does on paperwork, and if his caseload were decreased. The principal thinks it would be beneficial to increase parent involvement.

Special Day Class Teacher - In order to save the resource specialist some time, this SDC teacher does some of the resource specialist's assessment work.

Counselor - This person feels that the mainstreaming concept is better carried out now that the resource specialist program is in existence. Children spend more time in the regular setting with the extra "boost" they receive from the resource specialist program.

Math Teacher - This teacher thinks the resource specialist does not challenge the students enough and as a result their progress is slow.

Regular Class Teacher - This teacher thinks that students miss valuable classroom work which cannot be made up when they go to the resource specialist program. The district requires integrating subjects for instruction. For example, reading, social studies and spelling may be taught during one period and if a child goes to the resource specialist program during the period she/he may only get instruction in one of those subjects, and miss the other two entirely.

Parent of Child in the Resource Specialist Program - The parent feels the referral process is too long and valuable instruction time is wasted waiting for placement decisions to be made.

Site 2

Site 2 is a suburban elementary school with an enrollment of 600-700 students. The principal of the school describes the community as "mostly middle class, with more and more professional families moving in."

Resource Specialist II

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist has worked in his present position for two years. Prior to this he was a Title I English teacher (9th grade) for two years; was on the educational staff of Sea World for two years; did an internship with a mobile resource unit for one year; was a learning disability group teacher for one year; was an EH class teacher (7-8 grades) for one year; and was a resource specialist in another area for one year. He has a B.A. degree in psychology, secondary teaching and LH Specialist's credentials, and is currently working on his Master's degree in special education.

He is assigned half-time in each of two elementary schools. In one school his major responsibility is for kindergarten through third grade students, with some fourth graders; in the other school he is responsible for all grades, K-6. In the school where he is working with only the lower grades, another full-time resource specialist is present to work with upper grade students. The school has this arrangement because they found that twice as many students qualify for the resource specialist program in the upper grades than do at the primary level.

2. Activities

Referral - He receives referrals directly from teachers.

Assessment - He spends about three hours assessing each child who is referred, including: observations, administering achievement tests, consulting with the other resource specialists on campus, a speech therapist, the referring teacher, the principal, parent, etc.

Instructional Planning - This is done with assistance from an aide. Each child is contracted, and they will add to or delete something from the contract depending on the student's progress.

Placement - Placement decisions are made as a team with the principal, a speech therapist, and other involved personnel; the resource specialist attends at least one SAT meeting per week and one EAS meeting per month, where placement decisions are made.

Instruction - Approximately half of his time is spent giving instruction to students (one-to-one and in small groups). His aide carries out instruction when he is not present (i.e., at the other school where he works).

Review - He conducts yearly formal reviews of each student assigned to the resource specialist program.

Staff Development - He posts notices and information for teachers regarding the learning handicapped student.

Program Review - He reviews notetaking and report writing with the program specialist.

3. Job Definition

This resource specialist feels that he has "total authority" in determining how he will operate his program. He thinks this is the case because he's had much work experience and has gained the trust of his principal.

4. Efficiency/Effectiveness

This resource specialist judges himself as most effective giving direct instruction to students. He's less effective in diagnosing and planning instruction. One problem which he encounters in his work is having to split his time between two schools. He ends up having to spend too much time catching up on things that went on when he wasn't present.

5. Useful Experiences/Training for Present Position

The experience which the resource specialist had as a team member on a mobile resource unit (a team of specialists that visited rural schools and screened students, gave in-service to teachers, etc.) has given him the best training for his present position.

Now that he's working as a resource specialist he would like more training in diagnosis.

He recommends to anyone planning to work as a resource specialist that they learn skills in organizing and motivating students to succeed. He also thinks having much experience teaching students with learning handicaps is also important.

6. Recommended Changes

He thinks that he'd be most effective as a resource specialist if he could spend more time with teachers than he does (i.e., consulting about children who are not succeeding; training teachers how to organize their environments and instruction, etc.). He thinks it would be possible to spend more time with them if he had more experienced assistants who needed less supervision, and/or psychometrists who could relieve him of some or all of the testing he does.

He thinks more people who are trained to work with students' emotional, behavioral and social problems should be working in the schools.

B. Others' Perceptions

Principal - He talks informally with the resource specialist about students who are in the program or are being considered for special education placement. He also has more formal contact with the resource specialist at SAT meetings. He describes the resource specialist as the "most skilled teacher" he has. The principal gives him quite a bit of freedom because he has real confidence in the resource specialist. This principal thinks that the resource specialist would be more effective if he had more time to spend directly with regular class teachers--helping them with any students who have difficulties (not just those assigned to resource specialist program). The principal says that because of district constraints and time constraints this is not possible.

Before the implementation of the Master Plan, this principal said a resource team would meet with the parents of a child who was having problems, and they might identify the child's needs, but there were no resources available. Now, with the new Special Education laws, the quantity and quality of services has improved tremendously. With this, though, his own work has increased quite a bit. He said he now has about 70 adults to supervise.

Speech Therapist - According to this speech therapist, since resource specialist program students frequently have speech and language difficulties, he has frequent contact with the resource specialist to discuss students. He also receives referrals from the resource specialist for speech and language screening.

Regular Class Teacher (4th grade) - This teacher reported that before the start of school the resource specialist briefs him on new students he will be getting who have been identified as having learning or other kinds of problems. The resource specialist observes students and offers him suggestions on how to work with them. When the resource specialist sets up a schedule for students going to the resource specialist program, he tries to coordinate with the classroom schedule, and this teacher appreciates his efforts. The teacher thinks that the resource specialist can give individual attention to students who otherwise wouldn't be getting it. This, he thinks, is extremely important.

Psychologist - His contact with the resource specialist is to obtain information and referrals for counseling. He also gets information about the parents of the children he may be counseling from the resource specialist. His contact with the resource specialist is generally limited except when there is a question over placement from resource specialist program to special day class.

Special Day Class Teacher - He receives information about students as they are placed in his class from the resource specialist who usually worked with the child prior to special day class placement. He would like the resource specialist to help in academic testing of his SDC students but the resource specialist has no time for this. The resource specialist helps the SDC teacher write IEPs and gives advice on materials to use with students and programs to use in the class as well.

Resource Specialist III

A. Self Perception

1. Present Assignment and Past Experience

This resource specialist is beginning his second year as a resource specialist. He previously taught 5th and 6th grades for eight years. He also substituted at the K-6 level. He has worked in a gifted program. He taught creative writing as well as corrective reading and morphographic spelling. He also ran an infant program for parents and children, ages birth to 36 months.

His education includes a B.A. in Education/History/English, an Elementary Credential, Early Childhood Credential, Administrative Credential, LH Credential, and M.A. in Counseling.

His assignment is as a full-time resource specialist in an elementary school, but he mostly serves upper elementary children because there are more 4-6th graders who qualify for the program due to the guidelines for qualification.

2. Activities

Referral - He receives the referrals, checks the cumulative folder, talks with the teacher, and together they decide whether to process the child through the Special Education Referral System. From here he sees parents and explains their rights if the referral seems to require the special education processing. (Approximately 5% of his time is spent in this activity.)

Assessment - He conducts academic assessments. (Approximately 20% of his time is spent in this activity.)

Instructional Planning - This is completed after the placement decision has been made. It is done by the resource specialist and parents. (Approximately 5% of his time is spent in this activity.)

Placement - As a member of the IEP team, he helps in making placement decisions. An eligibility statement is written at placement meetings. (Approximately 5% of his time is spent in this activity.)

Instruction - The resource specialist program is designed as a pull-out program. His aide works with small groups of children. He works with larger groups and students with more difficult learning problems. (Approximately 60% of his time is spent in this activity.)

Review - He conducts ongoing and annual reviews of students. At the annual reviews, which the parents attend, a decision is made as to whether or not student will remain in resource specialist program. (Approximately 5% of his time is spent in this activity.)

Staff Development and In-service - The resource specialist displays teaching ideas on the staff bulletin board and makes audio-taped lessons and books for use with children available to staff.

3. Job Definition

His job is carried out exactly like it is written in the job description. He says that counselors and psychologists are concerned with the resource specialist role overlapping with their roles, but he sees no overlap. (The psychologist did not mention this in the interview.) He is accountable to the principal, the pupil services program specialist, the management program specialist and to the RLA director. He determines his own curriculum and isn't really given any direct instructions in his work.

He doesn't know whether he functions the same as other resource specialists in the area since he isn't familiar with their work.

4. Efficiency/Effectiveness

This resource specialist judges himself to be most effective in giving direct instruction to students, developing curriculum and consulting with teachers. He feels his role as coordinator of the "referral to review" process is a very important one, but involves too much work when added to a full caseload of students. He thinks his caseload should be lessened. He also thinks the amount of paperwork he must do is too much and should be lessened.

5. Useful Experiences/Training for Present Position

The M.A. in Counseling was a very useful aspect of his extensive training. This helped in working with children who have behavioral problems. Also parent training experience helped him in his consultation with parents.

Training he would like now that he has been on the job would involve curriculum information and more knowledge of the medical background of handicaps.

He would suggest counseling as the area of training important for people going into resource specialist work.

6. Recommended Changes

This resource specialist recommends that 20 students be the maximum caseload for each resource specialist. This size caseload would permit him to give quality instruction and at the same time coordinate the "referral to review" process which he thinks is a very important function. A decrease in the amount of paperwork is also something which he'd like implemented.

B. Others' Perceptions

No information.

II. PROGRAM SPECIALIST

A. Self Perception

1. Present Assignment and Past Experience

This Pupil Services program specialist has worked in his present position for three years. Prior to this he was a junior high school resource specialist for two and one-half years, a regular class teacher for seven years, a Miller-Unruh reading teacher for one year, and a substitute teacher for twelve years. Additional training he has had which relates to his present position has been the Madeline-Hunter Target Teaching Training, DISTAR, Corrective Reading, Math Teaching Techniques, and ongoing in-service through the school district.

He is assigned to ten schools (eight elementary, and two junior high schools). In each of these, he is responsible for all the LH classes and the resource specialist program. He is also a member of a screening committee which reviews applications for teaching positions in special education.

2. Activities

Referral - The program specialist is very involved in assisting new special day class teachers and resource specialists with this process (i.e., guiding them through the legal steps, paperwork, and parent contact, etc.); he is less involved with more experienced teachers. He spends approximately one hour a week consulting about routine site referrals and approximately three hours a week consulting about referrals for interim placements.

Assessment - He will make requests of psychologists to do assessment and he also helps teachers and resource specialists do testing. (He thinks this contact with students gives him a chance to get to know them better and to diagnose their problems so he is better informed when making placement decisions.)

Instructional Planning - Approximately three hours a week is spent doing instructional planning for students assigned to special day classes. If a teacher is inexperienced he may have entire responsibility for directing the students' instruction.

Placement - He consults with the principals, parents, support personnel, classroom teacher, aides, students, special day class teacher, and resource specialist in both exiting and entering schools in arranging for placements. He is a member of IEP team which makes all placement decisions.

Instruction - He may give demonstration lessons several times per year to resource specialists and special day class teachers. He also observes teachers giving instruction.

Review - He is actively involved in review of all special day class students. He directs the review, chairs review meetings, helps teachers prepare for these meetings, and has ultimate responsibility for reviewing data for resource specialist program and learning disability classes.

Staff Development - He holds monthly staff meetings with the resource specialist and special day class teachers assigned to him. He conducts a separate in-service for his new teachers at which he presents Master Plan procedures.

Program Development - He implements rather than develops programs (e.g., resource specialist program and special day class).

Program Review - Once a year he reviews resource specialists' and special day class teachers' folders to see that the IEPs and other forms are up to date.

Research - He cooperates and participates with the district research staff but does not initiate any research.

3. Job Definition

Before he began working as a program specialist the responsibilities of the job were not very clear to him. He's gotten some guidance from his supervisor (whose title is Program Supervisor), such as requests to observe new and non-tenured resource specialists and learning disability teachers and write evaluations of them, to collect class list counts in the district, and in-service directives. How he allocates his time is left up to him. His activities are similar to other program specialists (i.e., each is assigned to approximately ten schools with special day classes and resource specialist program). There are also people who are management program specialists in this region, and they have essentially similar responsibilities to the pupil services program specialist although their assignments are different (i.e., they have responsibilities to specific programs such as CH, SH, or PH).

He states that his most important activities as a program specialist are making placement arrangements for entering and exiting students and reviewing pupils' progress.

4. Efficiency/Effectiveness

He feels that a distinctive feature of his role as a program specialist is his "global view" of the students who are being considered for placement and review as well as of the services available to these students.

Several problems he encounters in his work include:

1) Parents not showing up for IEP meetings.
2) Trying to coordinate all personnel and activities when some people are not responsible for the things they're to do.
3) Working with regular class teachers who do not accept the spirit of the Master Plan.

5. Useful Experiences/Training for Present Position

In his beginning years as a program specialist he found the support of his colleagues most helpful to him. There was not enough time for formal training for his job, so he relied on his colleagues for answers and guidance.

Now that he's been at his job for three years, he'd like to have more involvement in the "evolutionary process of the law" and more input into program decisions (e.g., he'd like to attend RLA director's meetings).

Recommendations he'd make to anyone considering a job as a program specialist would be to gain much experience working with regular and special education students of all ages and develop good curriculum understanding, counseling skills, and people-relating skills.

6. Recommended Changes

He thinks the present title of his job should be changed to "Special Education Coordinator" because that describes more accurately what he does and also because there is confusion with the present title.

He'd like more time to carry out his responsibilities and have an opportunity to plan students' entire program through the high school years in order to create more continuity.

He wishes special education teachers coming out of colleges had better preparation, that they were less theoretical and more practical, and that they could organize instruction without needing as much assistance as many of them do.

B. Others' Perceptions

The following comments are in reference to a pupil services program specialist who was not interviewed.

Principal - The program specialist gives him a schedule at beginning of month as to when he will be in building. The program specialist shares the responsibility with him for evaluating the special education staff. The program specialist conducts EAS meetings (IEP meetings). He acts mostly as a consultant to staff (and in particular to the resource specialists and special day class teachers). The principal feels that the program specialist has quite a bit of autonomy in his school because he has a lot of confidence in the specialist's abilities. He is satisfied with how this program specialist functions in his school and could recommend no changes.

Special Day Class Teacher - He has contact with program specialists 2/3 afternoons per month. The program specialist sometimes substitutes for him so he can observe in other classes. The program specialist sometimes works directly with students to help determine problems and to get acquainted with them. He conducts monthly in-service to keep staff informed of legalities and to maintain uniform programs. This teacher calls on the program specialist concerning academic problems. If students are having behavior problems he consults with a psychologist. This program specialist is a source of curriculum materials and ideas and pre- and post-academic tests.

Fourth Grade Regular Teacher - He has no contact with the program specialist.

Parent of Special Day Class Child - The program specialist helped in writing the IEP with this mother. The program specialist then contacted the management program specialist for advice on classroom placement. This program specialist also assisted the parent in getting Adaptive Physical Education for the child.

Speech Therapist - His overall contact with the program specialist is minimal but occasionally he has met with him at IEP meetings. He has also talked with the program specialist informally about students, especially those who are being considered for placement outside the school.

School Psychologist - He has contact with him at EAS meetings (Area IEP meetings) which the program specialist chairs.

Resource Specialist - The program specialist comes every other week for one-half day and chairs area IEP team meetings as well as annual review of special day class children. The resource specialist uses the program specialist as a resource for ideas to help children he has problems with in their program. He also receives materials in-service from the program specialist.

APPENDIX C

Ad Hoc Committee/Personnel Development Committee Report on The Role of Program Specialists

Commission for Teacher Preparation and Licensing Regulations for the Resource Specialist Certificate of Competence

APPENDIX C.1.

rintendent of Public Instruction
and Director of Education

STATE OF CALIFORNIA
DEPARTMENT OF EDUCATION
STATE EDUCATION BUILDING, 721 CAPITOL MALL, SACRAMENTO 95814

December 14, 1979

TO: Advisory Commission on Special Education

FROM: Ad Hoc Committee/Personnel Development Committee

SUBJECT: THE ROLE OF THE PROGRAM SPECIALIST

INTRODUCTION:

This agenda item is in response to a request from the Advisory Commission on Special Education that an Ad Hoc Committee be appointed to determine current function or actual role of the Program Specialist.

After nearly four years of implementation of the California Master Plan, the aspects of the role of the Program Specialist remain controversial. This report will provide clarification as to the services the Program Specialist performs as designated in current statutes.

The committee, which included an administrative personnel, RLA Director, resource specialist, parent, psychologist, and program specialists based their determination of the role of the Program Specialist on AB-1250, Section 56335, which reads:

(a) A program specialist is a specialist who holds a valid special education credential, health services credential, or a school psychologist authorization and has advanced training and related experience in the education of individuals with exceptional needs and a specialized in-depth knowledge in at least one of the following areas: communicatively handicapped, physically handicapped, learning handicapped, severely handicapped pupils, preschool handicapped, or career-vocational development.

(b) The program specialist shall observe, consult with and assist resource specialists, designated instruction and services instructors, and special class teachers and shall plan programs, coordinate curricular resources and assess program effectiveness in the programs for individuals with exceptional needs. The program specialist shall also participate in each school's staff development, research, program development and innovation of special methods and approaches.

(c) A program specialist shall provide coordination, consultation and program development primarily in the one specialized area in subdivision (a) of his or her expertise and shall have responsibilities to assure that pupils have full educational opportunity regardless of district of residence in the special education services region.

To ensure adequate implementation of programs in large consortiums, the crucial link among the Responsible Local Agency (RLA), parents, and the districts is the Program Specialist. Procedures and policies are often monitored by the Program Specialist. As stated in Section 56335, the Program Specialist "has responsibility to assure that pupils have full educational opportunity regardless of district of residence in the special education service region".

Special education includes both direct and indirect services to individuals with exceptional needs. More often than not, the Program Specialist's role is one of indirect service. Since indirect services are not easily evaluated, the assistance that the Program Specialist offers is oftentimes overlooked.

In an era of increasing public demand for accountability, the comprehensive study of role definitions must consider the inferred as well as the actual job related activities of a position. A term such as "assist", which is fundamental to the role of the Program Specialist, must be understood. The role, as mandated by AB 1250, is one that goes beyond the day to day assistance within the classroom. It is a leadership role that can only be described as a pro-active, seeking-out type of assistance which brings together the various components of the Master Plan (i.e., resource specialists, teachers, designated instruction and services personnel, school appraisal teams, and educational assessment teams).

FUNCTIONS AND DUTIES:

A more accurate picture of the major areas of responsibility for services provided for children by the Program Specialist is sequentially described as follows:

A. Referral

1. Assist in implementing and monitoring referral procedures.

2. Assist regular classroom teachers in determining the appropriateness of referrals for special services.

3. Consult with administrators, resource specialists, designated instruction and services personnel (DIS) in modifying regular education programs for students determined to be ineligible for special education services.

4. Assist in the coordination of infant and preschool referrals.

5. Consult with and coordinate the referrals of community agencies providing service to pupils within the assigned area of specialty.

6. Assist school site councils under school improvement programs (SIP) in the referral process and in modifying the regular school program.

7. Provide staff development regarding referral procedures for the purpose of identification to teachers, parents, administrators, and community agencies.

B. Assessment

1. Participate in the coordination of informal and formal assessments conducted by various professionals both in school and in the community.

2. Assist DIS personnel, special day class teachers, and resource specialists in the selection and utilization of appropriate assessment instruments and techniques.

3. Consult with SAT/EAS teams and parents regarding effective application of assessment data.

4. Provide instruction in the use of various assessment instruments/techniques in specific areas of expertise.

C. Instructional Planning

1. Participate in placement and annual review meetings.

2. Assist resource specialists, special day class teachers, and SAT/EAS teams regarding assessment data for developing and/or modifying instructional plans.

3. Participate in the development of Individualized Education Programs (IEP).

4. Consult with parents regarding the educational planning process.

5. Assist in the development of annual goals and short term objectives of exceptional students.

D. Placement

1. Act as a resource/liaison to SAT/EAS teams and other personnel in preparation for and follow-up of placement.

2. Serve as a liaison to parents in helping them to understand the placement recommendation as determined by the SAT/EAS teams.

3. Assist in assuring that an appropriate placement is made for the exceptional student.

4. Consult with administrators, resource specialists, and DIS personnel in modifying regular education programs for students determined to be ineligible for special education services.

5. Participate in the placement of children in non-public and state school programs and monitor progress of pupils placed in these settings as requested.

6. Participate in the placement and review meetings in an advocacy role for students and/or teachers.

E. Instruction

1. Provide ongoing consultation with teachers regarding new and innovative methods, strategies, and materials.

2. Assist in the coordination of appropriate curricular resources needed for successful implementation of the IEP.

3. Offer supportive assistance to parents, teachers, and other staff in solving school-related problems.

4. Provide students and parents appropriate methods and strategies in the coordination of the instructional program between the home and school.

5. Assist in the implementation of annual goals and short-term objectives of exceptional students.

6. Demonstrate techniques and/or methods which enhance the educational progress of the individual student.

F. Review

1. Ensure that IEP's are appropriate and fully implemented.

2. Provide assistance to special day class teachers in documenting student progress.

3. Assist teachers and other professional staff in preparing for annual or requested reviews.

4. Participate in informal and formal program reviews at school sites and/or SESR level.

5. Consult with teachers, administrators, and parents regarding the operational aspects of a program.

6. Assist in the development of the comprehensive plan as well as identifying need for program change.

7. Assist in setting priority for identified program change.

STAFF DEVELOPMENT:

To aid in the successful implementation of the Master Plan, more emphasis is being placed on staff development. Since staff development interfaces with all the aforementioned sequential steps, it is therefore described here as a separate topic.

A. Service Population:

Students
Parents
Teachers
Administrators
Non-certificated personnel
Community Advisory Committee
Parent groups
Non-public schools
School site councils
School boards
Institutes of Higher Education
Public and private agencies
Community organizations

B. Services Provided:

1. Design staff development activities based on data collected through needs assessments.
2. Assist and/or coordinate the implementation of staff development programs and training activities.
3. Assist and/or coordinate in providing resources needed for staff development activities.
4. Provide inservice informally with individuals or small groups.

C. Sample Subject Areas:

Referral procedures

Assessment procedures and techniques

Knowledge and acceptance of individuals with exceptional needs

Identifying appropriate program alternatives and services

Coordinating available curricular resources required to implement IEPs

Review procedures for determining student progress including ongoing activities and techniques

Legislation and regulations pertaining to special education

Due process and procedural safeguards

Interfacing of regular and special education programs

Community education/awareness

RECOMMENDATIONS:

1. Advisory Commission on Special Education actively support the continuation of the role of the Program Specialist as written in AB 1250.
2. Make this report and results of further studies available to the State Board of Education and the Task Force on AB 8 regarding the Sunset Language.
3. Seek to differentiate and/or clarify the responsibilities of special education personnel in the implementation of AB 1250.
4. Conduct a study of the SESRs throughout the state to analyze the existing utilization and implementation of the Program Specialist's role as mandate in AB 1250. Make recommendations as a result of that study and monitor for successful implementation.

Appendix C.-2. Commission For Teacher Preparation and Licensing: Regulations For The Resource Specialist Certificate of Competence

80070.8 The Candidate for the Resource Specialist Certificate Shall Demonstrate the Skills, Knowledge and Performance Competencies Identified for Each of the Following Functions:

(a) The Consulting Function

(1) Provide consultant services to regular classroom teachers in the identification and assessment of learning and behavioral patterns in pupils.

(2) Consultation and assistance in the utilization of evaluation data for the modification of instruction and curriculum.

(3) Provide consultation services in the application of classroom management techniques.

(4) Provide consultant services as to resources (appropriate to individuals with exceptional needs) to regular staff members, parents and guardians.

(5) Consult in the development of pre-vocational and/or vocational plans for individuals with exceptional needs.

(6) Consult with regular classroom teachers and students as to their acceptance of students with exceptional needs.

(b) The Coordination Function

(1) Coordinate referral and assessment procedures.

(2) Assist in the coordination of School Appraisal Team meeting.

(3) Coordinate instructional planning; i.e., the development and implementation of Individualized Educational Programs for individuals with exceptional needs.

(4) Coordinate the implementation of special education services provided individuals with exceptional needs.

(5) Assist in the coordination of Designated Instruction and Services.

(6) Coordinate the collection of relevant information for those students referred to the School Appraisal Team.

(b) (continued)

(7) Coordinate the organization and distribution of media and materials for both resource and regular classrooms.

(8) Coordinate individualized instruction and activities of the Resource Specialist Program with regular classroom curriculum.

(9) Coordinate inservice workshops and workshops for staff and/or parents.

(10) Coordinate follow-up activities to insure service delivery to all individuals with exceptional needs.

(c) Functions Related to the Implementation of Laws, Regulations and Other Compliance Requirements

(1) Schedule and monitor School Appraisal Team Referral Procedures in accordance with legal requirements.

(2) Monitor the development of Individualized Educational Programs, and conduct review meetings in accordance with legal requirements.

(3) Process all information leading to approval of services by child's parent or guardian.

(4) Provide leadership for assuring full compliance with legal requirements.

(d) Staff Development and Inservice Education Function

(1) The utilization of systematic observations for referral to School Appraisal Teams.

(2) The understanding and interpretation of appropriate assessment tools.

(3) The selection and modification of appropriate instructional methods and materials.

(4) The application of classroom environment and behavior management techniques.

(5) The enhancement of social and emotional development of exceptional individuals within the educational environment of the regular classroom.

80070.8 (continued)

(e) Skills Related to the Parent Education Function

(1) Provide parents with basic knowledge of assessment procedures and instrumentations, and how to utilize the information.

(2) Provide parents with basic understanding of remedial methods and techniques as they relate to their own child's program.

(3) Provide parents with basic home enrichment and home management techniques designed to meet the needs of their child.

(4) Counsel parents in areas related to their child's abilities, including strengths and weaknesses; as well as to the child's needs and goals, including career and vocational planning alternatives.

(5) Provide parents with information as to effective utilization of community resources.

(6) Assist in planning of parent education workshops.

Note: Authority Cited: Section 44225, Education Code
Reference: Sections 56362 and 56362.5, Education Code

APPENDIX D

Questionnaires

COUNTY-DISTRICT SCHOOL CODE____________________________

RESPONDENT CODE____________________

PROGRAM SPECIALIST QUESTIONNAIRE

for the
California State Department of Education
Study of Role Delineation of Program Specialists
and Resource Specialists under the
California Master Plan for Special Education

Fall, 1980

Return within two weeks to:
Resource and Program Specialist Study
Graduate School of Education
University of California, Santa Barbara
Santa Barbara, California 93106
(805) 961-4151

GENERAL INSTRUCTIONS FOR COMPLETION

This questionnaire is to be completed by program specialists. Please answer all questions as accurately as possible. If you find a question that you cannot answer and there is no "Don't know" category, please record a "NA" (Not Applicable) beside the question. Feel free to write in any pertinent information.

Most questions have either numbers for you to circle or lines where an answer is to be written. We estimate that it should take about 45 minutes to complete the form. We recognize that this is a long questionnaire but we are trying to get a comprehensive description of the work and training of program and resource specialists.

Please complete and return the questionnaire within two weeks. You may return the completed form in the postage paid envelope provided. If you have any questions please call collect either Ruth Peck at (805) 961-4452 or Maurine Ballard at (805) 961-4151.

Thank you. We appreciate your participation.

PLEASE BEGIN WITH THE QUESTIONS IN PART A. THESE QUESTIONS SHOULD TAKE ABOUT 30 MINUTES TO COMPLETE.

PART A. THE QUESTIONS IN THIS SECTION ARE ABOUT YOUR WORK AS A PROGRAM SPECIALIST

A.1 What is your present job title?______________________________

A.2 How long have you held this position in this district or county?

______________YEARS

A.3 What is the title of your current supervisor?

____
(List Title)

A.4 Do you have supervisory responsibility for any of the following personnel? (Circle All Numbers That Apply)

1. NO SUPERVISORY RESPONSIBILITY
2. REGULAR TEACHERS
3. SPECIAL CLASS TEACHERS
4. RESOURCE SPECIALISTS
5. DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS
6. INSTRUCTIONAL AIDES
7. OTHER______________________
(Specify)

A.5 How many districts do you serve?

__________DISTRICTS

A.6 In how many schools do you work?

__________SCHOOLS

A.7 Where is your primary worksite located? (Circle Number)

1. REGULAR CLASSROOM
2. SPECIAL ROOM IN A SCHOOL BUILDING
3. DISTRICT OR COUNTY OFFICE
4. OTHER______________________
(Specify)

A.8 What grade level(s) do you currently serve? (Circle All Numbers That Apply)

1. PRESCHOOL
2. PRIMARY (K-3)
3. ELEMENTARY (4-6)
4. MIDDLE (7-8/9)
5. SECONDARY (9/10-12)
6. UNGRADED
7. OTHER______________________
(Specify)

A.9 How many miles per week on the average do you travel to cover your geographic area of responsibility? (Write Average Number Of Miles)

________________MILES

A.10 How many hours do you work as a program specialist during a typical week?

________________HOURS

A.11 . What type of salary schedule are you under? Circle Number)

1. TEACHING
2. ADMINISTRATIVE
3. OTHER____________________ (Specify)

A.12 What is your current salary range? (Circle Number)

1. UNDER $10,000 PER YEAR
2. $10,000 - $14,999 PER YEAR
3. $15,000 - $19,999 PER YEAR
4. $20,000 - $24,999 PER YEAR
5. $25,000 - $30,000 PER YEAR
6. OVER $30,000 PER YEAR

A.13 In your work how frequently do you encounter non-English speaking or limited English speaking handicapped students? (Circle Number)

1. NEVER
2. OCCASIONALLY
3. FREQUENTLY
4. MORE OR LESS DAILY

(If you do encounter non-English or limited English speaking students, what language(s) do they speak?)

____

____

A.14 How much responsibility do you have as a program specialist for the overall management of a student's case (from referral through placement and review of progress) (Circle Number)

1. NO RESPONSIBILITY
2. SOME RESPONSIBILITY
3. MAJOR RESPONSIBILITY
4. FULL RESPONSIBILITY

A.15 What degree of responsibility do you have for coordination, consultation, and/or program development in special education areas?

MAJOR means you have major responsibility
SOME means you have some responsibility
NONE means you have no responsibility

	Degree of Responsibility (Circle Your Answer)		
a) CAREER VOCATIONAL DEVELOPMENT	MAJOR	SOME	NONE
b) COMMUNICATIVELY HANDICAPPED	MAJOR	SOME	NONE
c) LEARNING HANDICAPPED	MAJOR	SOME	NONE
d) PHYSICALLY HANDICAPPED	MAJOR	SOME	NONE
e) PRESCHOOL HANDICAPPED	MAJOR	SOME	NONE
f) SEVERELY HANDICAPPED	MAJOR	SOME	NONE
g) OTHER____________________ (Specify)	MAJOR	SOME	NONE

A.16 What is the frequency of your professional contacts with other individuals in work situations?

N means NEVER - you have no contact whatsoever
R means RARELY - you have contact 1-5 times per year
O means OCCASIONALLY - you have contact 1-2 times per month
F means FREQUENTLY - you have contact 1-2 times per week
D means DAILY - you have more or less daily contact

	Please indicate the frequency of contact with each type of person listed below: (Circle Your Answer)					Do you feel that you should be spending LESS, MORE, or about the SAME amount of time with each type of individual? (Circle Your Answer)		
a) COORDINATORS OF NON SPECIAL EDUCATION PROGRAMS	N	R	O	F	D	LESS	MORE	SAME
b) COMMUNITY AGENCIES	N	R	O	F	D	LESS	MORE	SAME
c) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS.	N	R	O	F	D	LESS	MORE	SAME
d) HANDICAPPED STUDENTS	N	R	O	F	D	LESS	MORE	SAME
e) PARENTS	N	R	O	F	D	LESS	MORE	SAME
f) PRINCIPALS/VICE PRINCIPALS . . .	N	R	O	F	D	LESS	MORE	SAME
g) OTHER PROGRAM SPECIALISTS	N	R	O	F	D	LESS	MORE	SAME
h) REGULAR CLASS TEACHERS	N	R	O	F	D	LESS	MORE	SAME
i) RESOURCE SPECIALISTS.	N	R	O	F	D	LESS	MORE	SAME
j) SCHOOL PSYCHOLOGISTS	N	R	O	F	D	LESS	MORE	SAME
k) SPECIAL CLASS TEACHERS.	N	R	O	F	D	LESS	MORE	SAME
l) SPECIAL EDUCATION ADMINISTRATORS	N	R	O	F	D	LESS	MORE	SAME

A.17 How many of each of the following people do you have professional contact with during a typical week?

	Number of People (Write Number)
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	____________
b) HANDICAPPED STUDENTS	____________
c) PARENTS	____________
d) PRINCIPALS/VICE PRINCIPALS	____________
e) OTHER PROGRAM SPECIALISTS	____________
f) REGULAR CLASSROOM TEACHERS	____________
g) RESOURCE SPECIALISTS	____________
h) SCHOOL PSYCHOLOGISTS	____________
i) SPECIAL CLASS TEACHERS	____________

A.18 How is your work time distributed across a number of professional activities over the course of a typical school year?

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this activity more or less daily

	Please estimate the amount of time you engage in each of the following activities: (Circle Your Answer)					Do you feel you should be spending LESS, MORE, or about the SAME amount of time on each activity (Circle Your Answer)		
1. Assist school professionals in implementing referral procedures	N	R	O	F	D	LESS	MORE	SAME
2. Complete routine forms	N	R	O	F	D	LESS	MORE	SAME
3. Participate in the development of individualized Education Programs (IEP)	N	R	O	F	D	LESS	MORE	SAME
4. Assist IEP (SAT/EAS) teams and other personnel in preparation for and follow-up of placement	N	R	O	F	D	LESS	MORE	SAME
5. Provide ongoing consultation with teachers regarding new and innovative methods, approaches, and materials	N	R	O	F	D	LESS	MORE	SAME
6. Assist teachers and other professionals in documenting student progress	N	R	O	F	D	LESS	MORE	SAME
7. Coordinate informal and formal program reviews at school site and/or SESR level	N	R	O	F	D	LESS	MORE	SAME
8. Observe resource specialists, designated instruction and services instructors, and special class teachers	N	R	O	F	D	LESS	MORE	SAME
9. Participate in research in SESR	N	R	O	F	D	LESS	MORE	SAME
10. Work with other school personnel in development and implementation of innovative programs	N	R	O	F	D	LESS	MORE	SAME
11. Write reports	N	R	O	F	D	LESS	MORE	SAME
12. Monitor to see that IEP's are appropriate and fully implemented. . . .	N	R	O	F	D	LESS	MORE	SAME
13. Assist in coordination of assessments conducted by other professionals	N	R	O	F	D	LESS	MORE	SAME
14. Assist IEP team in using assessment data for developing and/or modifying IEP's	N	R	O	F	D	LESS	MORE	SAME
15. Consult with other personnel in modifying regular education programs for students who are ineligible for special education services	N	R	O	F	D	LESS	MORE	SAME

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this activity more or less daily

	Please estimate the amount of time you engage in *each* of the following activities: (Circle Your Answer)					Do you feel you should be spending LESS, MORE, or about the SAME amount of time on each activity (Circle Your Answer)		
16. Coordinate use of curricular resources required for successful IEP implementation	N	R	O	F	D	LESS	MORE	SAME
17. Assist teachers and other professionals in preparing for annual or requested reviews	N	R	O	F	D	LESS	MORE	SAME
18. Consult with teachers, administrators, and parents regarding the operational aspects of a program	N	R	O	F	D	LESS	MORE	SAME
19. Design staff development activities based on needs assessment	N	R	O	F	D	LESS	MORE	SAME
20. Write research reports	N	R	O	F	D	LESS	MORE	SAME
21. Assist in upgrading existing programs	N	R	O	F	D	LESS	MORE	SAME
22 Travel for job related activities	N	R	O	F	D	LESS	MORE	SAME
23. Assist in assuring an appropriate placement for each student	N	R	O	F	D	LESS	MORE	SAME
24. Assist other personnel in the selection and utilization of appropriate assessment instruments and techniques	N	R	O	F	D	LESS	MORE	SAME
25. Assist teachers in selecting materials and activities to meet goals and objectives of IEPs	N	R	O	F	D	LESS	MORE	SAME
26. Participate in the placement of students in non-public and state school programs and monitor progress of these students as requested	N	R	O	F	D	LESS	MORE	SAME
27. Work with students one at a time	N	R	O	F	D	LESS	MORE	SAME
28. Assist in assessing program effectiveness for students	N	R	O	F	D	LESS	MORE	SAME
29. Assist in development of the local comprehensive plan	N	R	O	F	D	LESS	MORE	SAME
30. Coordinate implementation of staff development activities	N	R	O	F	D	LESS	MORE	SAME
31. Assist in development of handbooks and materials	N	R	O	F	D	LESS	MORE	SAME
32. Engage in telephone communication	N	R	O	F	D	LESS	MORE	SAME
33. Monitor overall referral process	N	R	O	F	D	LESS	MORE	SAME
34. Consult with parents regarding the educational planning process	N	R	O	F	D	LESS	MORE	SAME

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this activity more or less daily

	Please estimate the amount of time you engage in each of the following activities: (Circle Your Answer)					Do you feel you should be spending LESS, MORE, of about the SAME amount of time on each activity (Circle Your Answer)		
35. Participate in placement and review meetings in an advocacy role for students	N	R	O	F	D	LESS	MORE	SAME
36. Work with small groups of students	N	R	O	F	D	LESS	MORE	SAME
37. Assist in identifying need for program change	N	R	O	F	D	LESS	MORE	SAME
38. Provide inservice on special topics as requested	N	R	O	F	D	LESS	MORE	SAME
39. Coordinate the referrals of community agencies	N	R	O	F	D	LESS	MORE	SAME
40. Coordinate instructional program between the home and school	N	R	O	F	D	LESS	MORE	SAME

A.19 How do you divide your professional time between the major areas of activity in your work. FOR EACH AREA OF ACTIVITY LISTED BELOW, WRITE AN ESTIMATE OF THE PERCENTAGE OF TIME OVER THE COURSE OF A TYPICAL SCHOOL YEAR THAT YOU DEVOTE TO THE AREA. PLEASE BE SURE THAT YOUR LIST OF PERCENTAGE ESTIMATES SUM TO 100%

Check (X) the time of year when activities in each area are heaviest.

	TIME ESTIMATE	FALL	WINTER	SPRING	SUMMER
a. Referral	________%	___	___	___	___
b. Assessment	________%	___	___	___	___
c. Instructional Planning	________%	___	___	___	___
d. Placement.	________%	___	___	___	___
e. Instruction.	________%	___	___	___	___
f. Student Review	________%	___	___	___	___
g. Program Review	________%	___	___	___	___
h. Staff Development/Inservice.	________%	___	___	___	___
i. Research	________%	___	___	___	___
j. Program Development/Innovation	________%	___	___	___	___
k. Other____________________ (specify)	________%	___	___	___	___
TOTAL:	100%				

A.20 Do you feel that your role and responsibilities as a program specialist are distinctly different from, overlap with, or are identical with the roles of other personnel? To what extent do you think your role and responsibilities conflict with the roles of other personnel?

DIFFERENT means you have distinctly different roles and responsibilities
OVERLAP means you have overlapping role and responsibilities
IDENTICAL means you have identical role and responsibilities
DK means Don't Know

NO means you have no conflict
SOME means you have some conflict
MUCH means you have much conflict
EXTREME means you have extreme conflict

	ROLE RELATIONSHIPS (Circle your answer for yourself as a Program Specialist)				DEGREE OF ROLE CONFLICT (Circle your answer for yourself as a Program Specialist)			
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
b) PRINCIPALS/VICE PRINCIPALS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
c) RESOURCE SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
d) REGULAR CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
e) OTHER PROGRAM SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
f) SCHOOL PSYCHOLOGISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
g) SPECIAL CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
h) SPECIAL EDUCATION ADMINISTRATORS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME

A.21 How satisfied are you with your work as a program specialist? (Circle Number)

1. NOT SATISFIED
2. SOMEWHAT SATISFIED
3. QUITE SATISFIED
4. EXTREMELY SATISFIED

A.22 To what extent do any of the following problems prevent you from fully carrying out your job requirements?

NOT means it is not a problem
SLIGHT means it is a slight problem
MODERATE means it is a moderate problem
EXTREME means it is an extreme problem

	DEGREE OF PROBLEM (Circle Your Answer)			
1. ADMINISTRATIVE PROBLEMS AT THE RLA LEVEL	NOT	SLIGHT	MODERATE	EXTREME
2. ADMINISTRATIVE PROBLEMS AT THE LOCAL LEVEL	NOT	SLIGHT	MODERATE	EXTREME
3. LACK OF AUTHORITY TO CARRY OUT DUTIES	NOT	SLIGHT	MODERATE	EXTREME
4. LACK OF TIME	NOT	SLIGHT	MODERATE	EXTREME
5. LACK OF SUPPORT FROM OTHERS	NOT	SLIGHT	MODERATE	EXTREME
6. CASELOAD TOO LARGE	NOT	SLIGHT	MODERATE	EXTREME
7. LACK OF TRAINING IN SPECIFIC AREAS	NOT	SLIGHT	MODERATE	EXTREME
8. OTHER ________________ (Specify)	NOT	SLIGHT	MODERATE	EXTREME

A.23 How effective, in general, do you think you are as a program specialist in providing needed services to each of the following?

NOT means you are not effective
SOMEWHAT means you are somewhat effective
QUITE means you are quite effective
EXTREMELY means you are extremely effective

	Degree of Effectiveness (Circle your answer)			
a) DESIGNATED INSTRUCTION AND SERVICES	NOT	SOMEWHAT	QUITE	EXTREMELY
b) HANDICAPPED STUDENTS . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
c) PARENTS.	NOT	SOMEWHAT	QUITE	EXTREMELY
d) PRINCIPALS/VICE PRINCIPALS	NOT	SOMEWHAT	QUITE	EXTREMELY
e) OTHER PROGRAM SPECIALISTS. . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
f) REGULAR CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY
g) RESOURCE SPECIALISTS. . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
h) SCHOOL PSYCHOLOGISTS . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
i) SPECIAL CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY

A.24 Are there any changes you would like to see in the definition of the role and responsibilities of the program specialist? (Circle Number)

1. NO
2. YES . . . . . Please describe the changes you would like to see.

Thank you very much for completing Part A.

PARTS B AND C ARE A LOT SHORTER AND SHOULD TAKE NO MORE THAN ABOUT 10-15 MINUTES MORE OF YOUR TIME

PART B. THESE QUESTIONS ARE ABOUT YOUR TRAINING AND EXPERIENCE.

B.1 List all position(s) you held as a professional educator prior to the one you have now. Also indicate the number of years in each position.

POSITION OR JOB TITLE (MOST RECENT FIRST)	NUMBER OF YEARS IN POSITION
____________________	____________
____________________	____________
____________________	____________

2 What type(s) of credential(s) do you hold? (List credential(s), and whether it is life or temporary.)

1. TEACHING CREDENTIAL(S)____________________ LIFE_______ TEMPORARY_______
   ____________________ LIFE_______ TEMPORARY_______
2. SPECIALIST CREDENTIAL(S)____________________ LIFE_______ TEMPORARY_______
   ____________________ LIFE_______ TEMPORARY_______
3. ADMINISTRATIVE CREDENTIAL(S)____________________ LIFE_______ TEMPORARY_______
   ____________________ LIFE_______ TEMPORARY_______
4. OTHER CREDENTIAL(S) OR AUTHORIZATION(S)____________________ LIFE_______ TEMPORARY_______
   ____________________ LIFE_______ TEMPORARY_______

.3 Are you now enrolled or have you completed a graduate degree or other special certification program besides your credentials? (Circle number and describe)

1. MASTER'S DEGREE (specify area)____________________
2. DOCTORAL DEGREE (specify area)____________________
3. OTHER CERTIFICATION (specify)____________________

B.4 How familiar are you with the following laws related to special education?

	Degree of Familiarity (Circle your answer)		
a) PUBLIC LAW 94 142 (Federal law: The Education for All Handicapped Children Act). . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
b) Old California Master Plan for Special Education (AB-1250). . . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
c) New California Master Plan for Special Education (SB-1870). . . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR

B.5 Do you have any formal training and/or job-related experience in each of the following areas? Also, how skilled would you say **you are** in these areas? FOR EACH AREA BELOW, INDICATE IN COLUMN A WHETHER OR NOT YOU HAVE HAD ANY FORMAL TRAINING IN THAT AREA; IN COLUMN B WHETHER OR NOT YOU HAVE HAD ANY JOB-RELATED EXPERIENCE IN THAT AREA; AND IN COLUMN C THE DEGREE OF A SKILL YOU FEEL YOU CURRENTLY HAVE IN THAT AREA.

	A		B		C		
	Formal training (Circle answer)		Job-related experience (Circle answer)		Degree of skill (Circle answer)		
a) Screening students for special education.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
b) Processing referrals of students for special education.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
c) Using tests for assessing the **educational needs** of special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
d) Using tests for assessing **social needs** of special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
e) Using observations for assessing the needs of special education students . .	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
f) Developing tests for assessing the needs of special education students . .	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
g) Developing Individual Education Programs (IEP) for special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
h) Using the IEP for instructional purposes	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
i) Instructing special education students in academic areas	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
j) Socially integrating special education students in the classroom	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
k) Coordinating resources and services for special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
l) Working with other educational personnel in providing services to special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
m) Communicating with parents of special education students for whom you are responsible.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
n) Using observation techniques for assessing teacher effectiveness.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED

8.6 What inservice experience related to your work with handicapped children have you had during the last year? How would you rate the overall usefulness of that inservice? (List topics of each inservice in Column A, and indicate usefulness of each inservice in Column B.)

VERY **means** inservice was **very** useful
SOMEWHAT **means** inservice was **somewhat** useful
NOT **means** inservice was **not** useful

A INSERVICE (List topic)	B USEFULNESS OF INSERVICE (Circle your answer)		
______________	VERY	SOMEWHAT	NOT
______________	VERY	SOMEWHAT	NOT
______________	VERY	SOMEWHAT	NOT
______________	VERY	SOMEWHAT	NOT
______________	VERY	SOMEWHAT	NOT
______________	VERY	SOMEWHAT	NOT

8.7 What has best prepared you to perform your current job? (Circle all answers that apply)

1. INSERVICE/WORKSHOPS
2. CONVENTIONS
3. JOURNALS
4. FORMAL COURSEWORK
5. INFORMAL PROFESSIONAL ACTIVITIES
6. OTHER______________
(specify)

8.8 Do you think there should be a Program Specialist credential? (Circle Number)

1. NO
2. YES

→ What training and experiences would you recommend for such a credential?

PART C. THESE QUESTIONS ARE ABOUT YOU (Circle Number For Each Item)

C.1 AGE

1. 25 OR YOUNGER
2. 26 TO 35
3. 36 TO 45
4. 46 TO 55
5. 56 OR OLDER

C.2 SEX

1. MALE
2. FEMALE

C.3 ETHNICITY (Optional)

1. AMERICAN INDIAN OR ALASKAN NATIVE
2. ASIAN OR PACIFIC ISLANDER
3. FILIPINO
4. BLACK, NOT OF HISPANIC ORIGIN
5. HISPANIC
6. WHITE, NOT OF HISPANIC ORIGIN

C.4 ARE YOU BILINGUAL? (Circle number)

1. NO
2. YES . . . . .What Languages?______________________________

____

C.5 Is there anything else you would like to tell us about program specialists and resource specialists or about the questionnaire? If so, please use this space for that purpose.

Your contribution to this effort is very greatly appreciated. If you would like a summary of results, please print your name and address on the back of the return envelope (not on this questionnaire). We will see that you get it. THANK YOU.

APPENDIX D. QUESTIONNAIRES

COUNTY-DISTRICT SCHOOL CODE____________________________

RESPONDENT CODE____________________

RESOURCE SPECIALIST QUESTIONNAIRE

for the
California State Department of Education
Study of Role Delineation of Program Specialists
and Resource Specialists under the
California Master Plan for Special Education

Fall, 1980

Return within two weeks to:
Resource and Program Specialist Study
Graduate School of Education
University of California, Santa Barbara
Santa Barbara, California 93106
(805) 961-4151

GENERAL INSTRUCTIONS FOR COMPLETION

This questionnaire is to be completed by resource specialists. Please answer all questions as accurately as possible. If you find a question that you cannot answer and there is no "Don't know" category, please record a "NA" (Not Applicable) beside the question. Feel free to write in any pertinent information.

Most questions have either numbers for you to circle or lines where an answer is to be written. We estimate that it should take about 45 minutes to complete the form. We recognize that this is a long questionnaire but we are trying to get a comprehensive description of the work and training of program and resource specialists.

Please complete and return the questionnaire within two weeks. You may return the completed form in the postage paid envelope provided. If you have any questions please call collect either Ruth Peck at (805) 961-4452 or Maurine Ballard at (805) 961-4151.

Thank you. We appreciate your participation.

PLEASE BEGIN WITH THE QUESTIONS IN PART A. THESE QUESTIONS SHOULD TAKE ABOUT 30 MINUTES TO COMPLETE.

PART A. THE QUESTIONS IN THIS SECTION ARE ABOUT YOUR WORK AS A RESOURCE SPECIALIST

A.1 What is your present job title?______________________________

A.2 How long have you held this position in this district or county?

________________YEARS

A.3 What is the title of your current supervisor?

____
(List Title)

A.4 How many instructional aides do you have (Circle Number)

1. NONE
2. ONE
3. TWO
4. THREE
5. FOUR OR MORE

A.5 How many districts do you serve?

__________DISTRICTS

A.6 In how many schools do you work?

__________SCHOOLS

A.7 Where is your primary worksite located? (Circle Number)

1. REGULAR CLASSROOM
2. SPECIAL ROOM IN A SCHOOL BUILDING
3. DISTRICT OR COUNTY OFFICE
4. OTHER____________________
(Specify)

A.8 What grade level(s) do you currently serve? (Circle All Numbers That Apply)

1. PRESCHOOL
2. PRIMARY (K-3)
3. ELEMENTARY (4-6)
4. MIDDLE (7-8/9)
5. SECONDARY (9/10-12)
6. UNGRADED
7. OTHER____________________
(Specify)

A.9 How many miles per week on the average do you travel to cover your geographic area of responsibility? (Write Average Number Of Miles)

________________MILES

A.10 How many hours do you work as a resource specialist during a typical week?

________________HOURS

A.11 What non-instructional duties do you have? (Circle All Numbers That Apply)

1. NONE
2. PLAYGROUND SUPERVISION
3. BUS/LUNCH SUPERVISION
4. SCHOOL SITE COUNCIL
5. DISTRICT COMMITTEE ASSIGNMENTS
6. BUILDING COMMITTEE ASSIGNMENTS
7. OTHER____________________
(Specify)

A.12 What type of salary schedule are you under? (Circle Number)

1. TEACHING
2. ADMINISTRATIVE
3. OTHER____________________ (Specify)

A.13 What is your current salary range? (Circle Number)

1. UNDER $10,000 PER YEAR
2. $10,000 - $14,999 PER YEAR
3. $15,000 - $19,999 PER YEAR
4. $20,000 - $24,999 PER YEAR
5. $25,000 - $30,000 PER YEAR
6. OVER $30,000 PER YEAR

A.14 In your work how frequently do you encounter non-English speaking or limited English speaking handicapped students? (Circle Number)

1. NEVER
2. OCCASIONALLY
3. FREQUENTLY
4. MORE OR LESS DAILY

(If you do encounter non-English or limited English speaking students, what language(s) do they speak?)

____

____

A.15 How much responsibility do you have as a resource specialist for the overall management of a student's case (from referral through placement and review of progress) (Circle Number)

1. NO RESPONSIBILITY
2. SOME RESPONSIBILITY
3. MAJOR RESPONSIBILITY
4. FULL RESPONSIBILITY

A.16 What is the average number of sessions per week that you have with each handicapped student you work with? (Circle Number)

1. 1
2. 2
3. 3
4. 4
5. 5 OR MORE

A.17 What is the average length of time spent with a handicapped student during each session? (Circle Number)

1. LESS THAN 15 MINUTES
2. 16 - 30 MINUTES
3. 31 - 45 MINUTES
4. 46 - 60 MINUTES
5. OVER 60 MINUTES

A.18 What is the average number of special education students assigned to you each month during the year (i.e., caseload)? (Write Number)

________________STUDENTS

A.19 What was the largest number of students assigned to you in a given month during the 1979/80 school year? What was the smallest number assigned? (Write Number)

________________LARGEST NUMBER OF STUDENTS ASSIGNED IN A MONTH

________________SMALLEST NUMBER OF STUDENTS ASSIGNED IN A MONTH

A.20 What was the approximate total number of special education students assigned to you during the entire 1979/80 school year? (Include students who moved away or transferred to other programs.) (Write Number)

________________STUDENTS

A.21 What is the frequency of your professional contacts with other individuals in work situations?

N means NEVER - you have no contact whatsoever
R means RARELY - you have contact 1-5 times per year
O means OCCASIONALLY - you have contact 1-2 times per month
F means FREQUENTLY - you have contact 1-2 times per week
D means DAILY - you have more or less daily contact

	Please indicate the frequency of contact with each type of person listed below: (Circle Your Answer)					Do you feel that you should be spending LESS, MORE, or about the SAME amount of time with each type of individual? (Circle Your Answer)		
a) COORDINATORS OF NON SPECIAL EDUCATION PROGRAMS	N	R	O	F	D	LESS	MORE	SAME
b) COMMUNITY AGENCIES	N	R	O	F	D	LESS	MORE	SAME
c) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	N	R	O	F	D	LESS	MORE	SAME
d) HANDICAPPED STUDENTS	N	R	O	F	D	LESS	MORE	SAME
e) PARENTS	N	R	O	F	D	LESS	MORE	SAME
f) PRINCIPALS/VICE PRINCIPALS	N	R	O	F	D	LESS	MORE	SAME
g) PROGRAM SPECIALISTS	N	R	O	F	D	LESS	MORE	SAME
h) REGULAR CLASS TEACHERS	N	R	O	F	D	LESS	MORE	SAME
i) OTHER RESOURCE SPECIALISTS	N	R	O	F	D	LESS	MORE	SAME
j) SCHOOL PSYCHOLOGISTS	N	R	O	F	D	LESS	MORE	SAME
k) SPECIAL CLASS TEACHERS	N	R	O	F	D	LESS	MORE	SAME
l) SPECIAL EDUCATION ADMINISTRATORS	N	R	O	F	D	LESS	MORE	SAME

A.22 How many of each of the following people do you have professional contact with during a typical week?

	Number of People (Write Number)
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	
b) HANDICAPPED STUDENTS	
c) PARENTS	
d) PRINCIPALS/VICE PRINCIPALS	
e) PROGRAM SPECIALISTS	
f) REGULAR CLASSROOM TEACHERS	
g) OTHER RESOURCE SPECIALISTS	
h) SCHOOL PSYCHOLOGISTS	
i) SPECIAL CLASS TEACHERS	

A.23 How is your work time distributed across a number of professional activities over the course of a typical school year?

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this more or less daily

	Please estimate the amount of time you engage in each of the following activities: (Circle YOUR ANSWER)					Do you feel you should be spending LESS, MORE, or about the SAME amount of time on each activity (Circle Your Answer)		
1. Initiate referral process for specific students.	N	R	O	F	D	LESS	MORE	SAME
2. Assist in interpretation and utilization of student assessment findings.	N	R	O	F	D	LESS	MORE	SAME
3. Assist teachers in selecting instructional methods and materials to meet goals and objectives of IEP.	N	R	O	F	D	LESS	MORE	SAME
4. Participate with IEP team in making placement recommendations for handicapped students	N	R	O	F	D	LESS	MORE	SAME
5. Coordinate implementation of special education services for handicapped students	N	R	O	F	D	LESS	MORE	SAME
6. Assess student progress on a regular basis and revise IEPs as appropriate	N	R	O	F	D	LESS	MORE	SAME
7. Provide resource information and materials regarding handicapped students to regular staff members. . . .	N	R	O	F	D	LESS	MORE	SAME
8. Supervise instruction by Resource Specialist aide(s)	N	R	O	F	D	LESS	MORE	SAME
9. Complete forms and write reports	N	R	O	F	D	LESS	MORE	SAME
10. Refer special education students who do not indicate appropriate progress to the local IEP team.	N	R	O	F	D	LESS	MORE	SAME
11. Conduct formal and/or informal assessments of students.	N	R	O	F	D	LESS	MORE	SAME
12. Coordinate the development of Individualized Education Programs (IEPs) for handicapped students.	N	R	O	F	D	LESS	MORE	SAME
13. Consult with parents regarding the educational planning process	N	R	O	F	D	LESS	MORE	SAME
14. Provide direct instruction to students whose needs have been identified in a written IEP and who are assigned to a regular classroom teacher for a majority of the school day.	N	R	O	F	D	LESS	MORE	SAME
15. Monitor progress of students who are no longer in the Resource Specialist Program	N	R	O	F	D	LESS	MORE	SAME

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this activity more or less daily

	Please estimate the amount of time you engage in *each* of the following activities: (Circle Your Answer)					Do you feel you should be spending LESS, MORE, or about the SAME amount of time on each activity (Circle Your Answer)		
16. Assist Program Specialists in developing and implementing innovative special education programs	N	R	O	F	D	LESS	MORE	SAME
17. Travel for job related activities	N	R	O	F	D	LESS	MORE	SAME
18. Participate in placement and review meetings in an advocacy role for students	N	R	O	F	D	LESS	MORE	SAME
19. Receive and screen referrals made by other school personnel	N	R	O	F	D	LESS	MORE	SAME
20. Assist parents in understanding assessment procedures	N	R	O	F	D	LESS	MORE	SAME
21. Consult with teachers in the application of classroom management techniques	N	R	O	F	D	LESS	MORE	SAME
22. Assist other professionals in upgrading existing special education programs	N	R	O	F	D	LESS	MORE	SAME
23. Work with handicapped students one at a time	N	R	O	F	D	LESS	MORE	SAME
24. Engage in telephone communication	N	R	O	F	D	LESS	MORE	SAME
25. Participate in meetings not directly related to classroom responsibilities	N	R	O	F	D	LESS	MORE	SAME
26. Coordinate and monitor referral procedures for specific students at school site	N	R	O	F	D	LESS	MORE	SAME
27. Work with small groups of handicapped students	N	R	O	F	D	LESS	MORE	SAME
28. Consult with regular classroom teachers in the identification and assessment of learning and behavioral patterns of handicapped students	N	R	O	F	D	LESS	MORE	SAME
29. Assist in coordination of IEP meetings	N	R	O	F	D	LESS	MORE	SAME
30. Conduct review meetings in accordance with legal requirements	N	R	O	F	D	LESS	MORE	SAME
31. Assist teachers in methods to enhance social and emotional development of handicapped students within the regular classroom.	N	R	O	F	D	LESS	MORE	SAME
32. Secure parental consent to conduct assessments	N	R	O	F	D	LESS	MORE	SAME
33. Coordinate implementation of activities of Resource Specialist Program with regular classroom curriculum	N	R	O	F	D	LESS	MORE	SAME

N means NEVER - you never engage in this activity
R means RARELY - you engage in this activity 1-5 days per year
O means OCCASIONALLY - you engage in this activity 1-2 days per month
F means FREQUENTLY - you engage in this activity 1-2 days per week
D means DAILY - you engage in this activity more or less daily

	Please estimate the amount of time you engage in each of the following activities: (Circle Your Answer)					Do you feel you should be spending LESS, MORE, of about the SAME amount of time on each activity (Circle Your Answer)		
34. Consult with teachers in the utilization of evaluation data for modification of instruction and curriculum	N	R	O	F	D	LESS	MORE	SAME
35. Provide parents with basic understanding of remedial methods and techniques for their child	N	R	O	F	D	LESS	MORE	SAME
36. Coordinate assessment procedures	N	R	O	F	D	LESS	MORE	SAME
37. Counsel parents related to their child's abilities, including strengths and weaknesses	N	R	O	F	D	LESS	MORE	SAME
38. Coordinate inservice workshops on a variety of topics	N	R	O	F	D	LESS	MORE	SAME
39. Provide parents with information as to effective utilization of community resources.	N	R	O	F	D	LESS	MORE	SAME
40. Consult in the development of prevocational and/or vocational plans for handicapped students	N	R	O	F	D	LESS	MORE	SAME

A.24 How do you divide your professional time between the major areas of activity in your work. FOR EACH AREA OF ACTIVITY LISTED BELOW, WRITE AN ESTIMATE OF THE PERCENTAGE OF TIME OVER THE COURSE OF A TYPICAL SCHOOL YEAR THAT YOU DEVOTE TO THE AREA. PLEASE BE SURE THAT YOUR LIST OF PERCENTAGE ESTIMATES SUM TO 100%

Check (X) the time of year when activities in each area are heaviest.

	TIME ESTIMATE	FALL	WINTER	SPRING	SUMMER
a. Referral	________%	___	___	___	___
b. Assessment	________%	___	___	___	___
c. Instructional Planning	________%	___	___	___	___
d. Placement.	________%	___	___	___	___
e. Instruction.	________%	___	___	___	___
f. Student Review	________%	___	___	___	___
g. Staff Development/Inservice.	________%	___	___	___	___
h. Program Development/Innovation	________%	___	___	___	___
i. Other ____________________ (specify)	________%	___	___	___	___

TOTAL: 100%

A.25 Do you feel that your role and responsibilities as a resource specialist are distinctly different from, overlap with, or are identical with the roles of other personnel? To what extent do you think your role and responsibilities conflict with the roles of other personnel?

DIFFERENT	means	you have distinctly different roles and responsibilities	NO	means	you have no conflict
OVERLAP	means	you have overlapping role and responsibilities	SOME	means	you have some conflict
IDENTICAL	means	you have identical role and responsibilities	MUCH	means	you have much conflict
DK	means	Don't Know	EXTREME	means	you have extreme conflict

	ROLE RELATIONSHIPS (Circle your answer for yourself as a Resource Specialist)				DEGREE OF ROLE CONFLICT (Circle your answer for yourself as a Resource Specialist)			
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
b) PRINCIPALS/VICE PRINCIPALS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
c) PROGRAM SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
d) REGULAR CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
e) OTHER RESOURCE SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
f) SCHOOL PSYCHOLOGISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
g) SPECIAL CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME
h) SPECIAL EDUCATION ADMINISTRATORS	DIFFERENT	OVERLAP	IDENTICAL	DK	NO	SOME	MUCH	EXTREME

A.26 How satisfied are you with your work as a resource specialist? (Circle Number)

1. NOT SATISFIED
2. SOMEWHAT SATISFIED
3. QUITE SATISFIED
4. EXTREMELY SATISFIED

A.27 To what extent do any of the following problems prevent you from fully carrying out your job requirements?

NOT	means	it is not a problem
SLIGHT	means	it is a slight problem
MODERATE	means	it is a moderate problem
EXTREME	means	it is an extreme problem

	DEGREE OF PROBLEM (Circle Your Answer)			
1. ADMINISTRATIVE PROBLEMS AT THE RLA LEVEL	NOT	SLIGHT	MODERATE	EXTREME
2. ADMINISTRATIVE PROBLEMS AT THE LOCAL LEVEL	NOT	SLIGHT	MODERATE	EXTREME
3. LACK OF AUTHORITY TO CARRY OUT DUTIES	NOT	SLIGHT	MODERATE	EXTREME
4. LACK OF TIME	NOT	SLIGHT	MODERATE	EXTREME
5. LACK OF SUPPORT FROM OTHERS	NOT	SLIGHT	MODERATE	EXTREME
6. CASELOAD TOO LARGE	NOT	SLIGHT	MODERATE	EXTREME
7. LACK OF TRAINING IN SPECIFIC AREAS	NOT	SLIGHT	MODERATE	EXTREME
8. OTHER______________ (Specify)	NOT	SLIGHT	MODERATE	EXTREME

A.28 How effective, in general, do you think you are as a resource specialist in providing needed services to each of the following?

NOT means you are not effective
SOMEWHAT means you are somewhat effective
QUITE means you are quite effective
EXTREMELY means you are extremely effective

	Degree of Effectiveness (Circle your answer)			
a) DESIGNATED INSTRUCTION AND SERVICES	NOT	SOMEWHAT	QUITE	EXTREMELY
b) HANDICAPPED STUDENTS . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
c) PARENTS.	NOT	SOMEWHAT	QUITE	EXTREMELY
d) PRINCIPALS/VICE PRINCIPALS	NOT	SOMEWHAT	QUITE	EXTREMELY
e) PROGRAM SPECIALISTS. . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
f) REGULAR CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY
g) OTHER RESOURCE SPECIALISTS. . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
h) SCHOOL PSYCHOLOGISTS . . .	NOT	SOMEWHAT	QUITE	EXTREMELY
i) SPECIAL CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY

A.29 Are there any changes you would like to see in the definition of the role and responsibilities of the resource specialist? (Circle Number)

1. NO

2. YES . . . . . Please describe the changes you would like to see.

Thank you very much for completing Part A.

PARTS B AND C ARE A LOT SHORTER AND SHOULD TAKE NO MORE THAN ABOUT 10-15 MINUTES MORE OF YOUR TIME

PART B. THESE QUESTIONS ARE ABOUT YOUR TRAINING AND EXPERIENCE.

B.1 List all position(s) you held as a professional educator prior to the one you have now. Also indicate the number of years in each position.

POSITION OR JOB TITLE (MOST RECENT FIRST)	NUMBER OF YEARS IN POSITION
____________________	____________________
____________________	____________________
____________________	____________________

B.2 What type(s) of credential(s) do you hold? (List credential(s), and whether it is life or temporary.)

1. TEACHING
   CREDENTIAL(S)____________________LIFE________TEMPORARY________
   ____________________LIFE________TEMPORARY________
2. SPECIALIST
   CREDENTIAL(S)____________________LIFE________TEMPORARY________
   ____________________LIFE________TEMPORARY________
3. ADMINISTRATIVE
   CREDENTIAL(S)____________________LIFE________TEMPORARY________
   ____________________LIFE________TEMPORARY________
4. OTHER
   CREDENTIAL(S) OR
   AUTHORIZATION(S)____________________LIFE________TEMPORARY________
   ____________________LIFE________TEMPORARY________

B.3 Are you now enrolled or have you completed a graduate degree or other special certification program besides your credentials? (Circle number and describe)

1. MASTER'S DEGREE (specify area)____________________
2. DOCTORAL DEGREE (specify area)____________________
3. OTHER CERTIFICATION (specify)____________________

B.4 How familiar are you with the following laws related to special education?

	Degree of Familiarity (Circle your answer)		
a) PUBLIC LAW 94 142 (Federal law: The Education for All Handicapped Children Act). . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
b) Old California Master Plan for Special Education (AB-1250). . . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
c) New California Master Plan for Special Education (SB-1870). . . .	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR

B.5 Do you have any formal training and/or job-related experience in each of the following areas? Also, how skilled would you say you are in these areas? FOR EACH AREA BELOW, INDICATE IN COLUMN A WHETHER OR NOT YOU HAVE HAD ANY FORMAL TRAINING IN THAT AREA; IN COLUMN B WHETHER OR NOT YOU HAVE HAD ANY JOB-RELATED EXPERIENCE IN THAT AREA; AND IN COLUMN C THE DEGREE OF A SKILL YOU FEEL YOU CURRENTLY HAVE IN THAT AREA.

	A		B		C		
	Formal training (Circle answer)		Job-related experience (Circle answer)		Degree of skill (Circle answer)		
a) Screening students for special education.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
b) Processing referrals of students for special education.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
c) Using tests for assessing the **educational needs** of special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
d) Using tests for assessing **social needs** of special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
e) Using observations for assessing the needs of special education students . .	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
f) Developing tests for assessing the needs of special education students . .	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
g) Developing Individual Education Programs (IEP) for special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
h) Using the IEP for instructional purposes	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
i) Instructing special education students in academic areas	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
j) Socially integrating special education students in the classroom	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
k) Coordinating resources and services for special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
l) Working with other educational personnel in providing services to special education students	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
m) Communicating with parents of special education students for whom you are responsible.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED
n) Using observation techniques for assessing teacher effectiveness.	YES	NO	YES	NO	NOT SKILLED	SOMEWHAT SKILLED	VERY SKILLED

B.6 What inservice experience related to your work with handicapped children have you had during the last year? How would you rate the overall usefulness of that inservice? (List topics of each inservice in Column A, and indicate usefulness of each inservice in Column B.)

VERY **means** inservice was **very** useful
SOMEWHAT **means** inservice was **somewhat** useful
NOT **means** inservice was **not** useful

A INSERVICE (List topic)	B USEFULNESS OF INSERVICE (Circle your answer)		
	VERY	SOMEWHAT	NOT
	VERY	SOMEWHAT	NOT
	VERY	SOMEWHAT	NOT
	VERY	SOMEWHAT	NOT
	VERY	SOMEWHAT	NOT
	VERY	SOMEWHAT	NOT

B.7 What has best prepared you to perform your current job? (Circle all answers that apply)

1. INSERVICE/WORKSHOPS
2. CONVENTIONS
3. JOURNALS
4. FORMAL COURSEWORK
5. INFORMAL PROFESSIONAL ACTIVITIES
6. OTHER ____________________
(specify)

B.8 The Commission for Teacher Preparation and Licensing is proposing regulations on the Resource Specialist Certificate of Competence. Do you basically agree or disagree with the proposed requirements for certification? (Circle number)

1. YES
2. NO
3. I AM NOT AWARE OF NEW REQUIREMENTS

→ What training and experiences would you recommend for certification?

PART C. THESE QUESTIONS ARE ABOUT YOU (Circle Number For Each Item)

C.1 AGE

1. 25 OR YOUNGER
2. 26 TO 35
3. 36 TO 45
4. 46 TO 55
5. 56 OR OLDER

C.2 SEX

1. MALE
2. FEMALE

C.3 ETHNICITY (Optional)

1. AMERICAN INDIAN OR ALASKAN NATIVE
2. ASIAN OR PACIFIC ISLANDER
3. FILIPINO
4. BLACK, NOT OF HISPANIC ORIGIN
5. HISPANIC
6. WHITE, NOT OF HISPANIC ORIGIN

C.4 ARE YOU BILINGUAL? (Circle number)

1. NO
2. YES . . . . .What Languages?____________________________

____

C.5 Is there anything else you would like to tell us about resource specialists and program specialists or about the questionnaire? If so, please use this space for that purpose.

Your contribution to this effort is very greatly appreciated. If you would like a summary of results, please print your name and address on the back of the return envelope (not on this questionnaire). We will see that you get it. THANK YOU.

APPENDIX D. QUESTIONNAIRES

COUNTY-DISTRICT SCHOOL CODE____________________________

RESPONDENT CODE____________________

SCHOOL PERSONNEL QUESTIONNAIRE

for the
California State Department of Education
Study of Role Delineation of Program Specialists
and Resource Specialists under the
California Master Plan for Special Education

Fall, 1980

Return within two weeks to:
Resource and Program Specialist Study
Graduate School of Education
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GENERAL INSTRUCTIONS FOR COMPLETION

The California Master Plan for Special Education is a state law (SB 1870) which describes a comprehensive approach to providing special education and services to individuals with exceptional needs (IWENs). IWENs are those pupils who have been identified as learning, communicatively, physically or severely handicapped and who cannot be educated in the regular classroom without special assistance. Two new roles which have been added to the school system as part of this Master Plan are the Resource Specialist and the Program Specialist.

The Resource Specialist is supposed to provide instruction and services to pupils who are assigned to regular classroom teachers for a majority of the school day. In addition, the Resource Specialist is supposed to provide consultation, resource information, and assistance to parents and regular staff members.

The Program Specialist is supposed to provide consultation, coordination, staff development, and assessment of program effectiveness for the special education services provided to IWENs.

The present study is an examination of the roles and functioning of Program and Resource Specialists. Please answer all questions as accurately as possible. If you find a question that you cannot answer and there is no "Don't know" category, please record a "NA" (Not Applicable) beside the question. Feel free to write in any pertinent information.

Most questions have either numbers for you to circle or lines where an answer is to be written. We estimate that it should take about 30 minutes to complete the form. We recognize that this is a long questionnaire, but we are trying to get a comprehensive description of the work and training of program and resource specialists.

Please complete and return the questionnaire within two weeks. You may return the completed form in the postage paid envelope provided. If you have any questions please call collect either Ruth Peck at (805) 961-4452 or Maurine Ballard at (805) 961-4151.

Thank you. We appreciate your participation.

PART A. THE QUESTIONS IN THIS SECTION ARE ABOUT YOUR PROFESSIONAL CONTACT WITH PEOPLE IN SPECIAL EDUCATION

A.1 How frequently are you in professional contact with handicapped students and special education personnel other than Program and Resource Specialists?

N means NEVER - you have no contact whatsoever
R means RARELY - you have contact 1-5 times per year
O means OCCASIONALLY - you have contact 1-2 times per month
F means FREQUENTLY - you have contact 1-2 times per week
D means DAILY - you have more or less daily contact

	FREQUENCY OF CONTACT (Circle Your Answer)				
a) LEARNING, COMMUNICATIVELY, PHYSICALLY, AND/OR SEVERELY HANDICAPPED STUDENTS	N	R	O	F	D
b) SPECIAL EDUCATION PERSONNEL OTHER THAN PROGRAM AND RESOURCE SPECIALISTS	N	R	O	F	D

A.2 What is the nature of your contact with Program and Resource Specialists? FOR EACH AREA LISTED BELOW PLEASE INDICATE IN COLUMN A THE AVERAGE FREQUENCY OF YOUR CONTACT IN THAT AREA WITH PROGRAM SPECIALISTS. IN COLUMN B INDICATE THE AVERAGE FREQUENCY OF CONTACT WITH RESOURCE SPECIALISTS.

N means NEVER - you have no contact whatsoever
R means RARELY - you have contact 1-5 times per year
O means OCCASIONALLY - you have contact 1-2 times per month
F means FREQUENTLY - you have contact 1-2 times per week
D means DAILY - you have more or less daily CONTACT

	A					B				
	FREQUENCY OF CONTACT WITH PROGRAM SPECIALISTS (Circle Your Answer)					FREQUENCY OF CONTACT WITH RESOURCE SPECIALISTS (Circle Your Answer)				
(a) REFERRAL: "I have contact with the specialist when students are being referred for special education programs". . . .	N	R	O	F	D	N	R	O	F	D
(b) ASSESSMENT: "I have contact with the specialist when assessment instruments and techniques are selected, developed, and/or utilized".	N	R	O	F	D	N	R	O	F	D
c) INSTRUCTIONAL PLANNING: "I have contact with the specialist when instructional plans (e.g.,IEP's) are developed". .	N	R	O	F	D	N	R	O	F	D
(d) PLACEMENT: "I have contact with the specialist when students are being placed in special education programs".	N	R	O	F	D	N	R	O	F	D
(e) INSTRUCTION: "I have contact with the specialist when instructional methods, strategies, and/or materials for special education students are being implemented"	N	R	O	F	D	N	R	O	F	D
(f) REVIEW: "I have contact with the specialist when student progress and/or special programs are being reviewed".	N	R	O	F	D	N	R	O	F	D
(g) OTHER: ______________________ (specify)	N	R	O	F	D	N	R	O	F	D

PART B. THE FOLLOWING QUESTIONS ARE CONCERNED WITH YOUR VIEWS ON THE WORK OF PROGRAM SPECIALISTS AND RESOURCE SPECIALISTS.

Given your understanding of the work of typical Program Specialists and Resource Specialists, please answer the following questions, using Coluum A for responses concerning Program Specialists and Column B for Resource Specialists. (If you are unfamiliar with the work of either of these specialists use the "DK" column for your answers for that specialist.)

B.1 How much responsibility does each specialist have for the delivery of services to handicapped students in each of the following specific areas?

NO means Specialist has no responsibility
SOME means Specialist has some responsibility
MAJOR means Specialist has major responsibility
FULL means Specialist has full responsibility
DK means Don't know

	A					B				
	EXTENT OF RESPONSIBILITY (Circle Your Answers For Program Specialist)					EXTENT OF RESPONSIBILITY (Circle Your Answers For Resource Specialist)				
a) Referral	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
b) Assessment	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
c) Instructional Planning	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
d) Placement	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
e) Instruction	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
f) Student Review	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK
g) Overall Management of a Student's Case	NO	SOME	MAJOR	FULL	DK	NO	SOME	MAJOR	FULL	DK

B.2 Do you feel each specialist's role and responsibilities are distinctly different from, overlap with or are identical with the roles of other personnel?

DIFFERENT means specialist has distinctly different roles and responsibilities
OVERLAP means specialist has overlapping roles and responsibilities
IDENTICAL means specialist has identical roles and responsibilities
DK means Don't know

	A				B			
	ROLE RELATIONSHIPS (Circle Your Answer for Program Specialist)				ROLE RELATIONSHIPS (Circle Your Answer for Resource Specialist)			
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
b) PRINCIPALS/ VICE PRINCIPALS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
c) PROGRAM SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
d) REGULAR CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
e) RESOURCE SPECIALISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
f) SCHOOL PSYCHOLOGISTS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
g) SPECIAL CLASS TEACHERS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK
h) SPECIAL EDUCATION ADMINISTRATORS	DIFFERENT	OVERLAP	IDENTICAL	DK	DIFFERENT	OVERLAP	IDENTICAL	DK

B.3 To what extent do you think each specialists' role and responsibilities conflict with the roles of other personnel.

NO means no role conflict
SOME means some role conflict
MUCH means much role conflict
EXTREME means extreme role conflict
DK means don't know

	A					B				
	DEGREE OF ROLE CONFLICT (Circle Your Answer for Program Specialist)					DEGREE OF ROLE CONFLICT (Circle Your Answer for Resource Specialist)				
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
b) PRINCIPALS/VICE PRINCIPALS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
c) PROGRAM SPECIALISTS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
d) REGULAR CLASS TEACHERS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
e) RESOURCE SPECIALISTS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
f) SCHOOL PSYCHOLOGISTS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
g) SPECIAL CLASS TEACHERS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK
h) SPECIAL EDUCATION ADMINISTRATORS	NO	SOME	MUCH	EXTREME	DK	NO	SOME	MUCH	EXTREME	DK

B.4 How effective, in general, do you think each specialist is in providing needed services to each of the following?

NOT means not effective
SOMEWHAT means somewhat effective
QUITE means quite effective
EXTREMELY means extremely effective
DK means don't know

	A					B				
	DEGREE OF EFFECTIVENESS (Circle Your Answer For Program Specialist)					DEGREE OF EFFECTIVENESS (Circle Your Answer For Resource Specialist)				
a) DESIGNATED INSTRUCTION AND SERVICES INSTRUCTORS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
b) HANDICAPPED STUDENTS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
c) PARENTS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
d) PRINCIPALS/VICE PRINCIPALS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
e) PROGRAM SPECIALISTS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
f) REGULAR CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
g) RESOURCE SPECIALISTS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
h) SCHOOL PSYCHOLOGISTS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
i) SPECIAL CLASS TEACHERS	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
j) YOU - IN YOUR ROLE	NOT	SOMEWHAT	QUITE	EXTREMELY	DK	NOT	SOMEWHAT	QUITE	EXTREMELY	DK
	(CHECK HERE ________ IF YOU HAVE NO INTERACTION)					(CHECK HERE ________ IF YOU HAVE NO INTERACTION)				

NOTE: Please make sure you have completed both Column A and Column B in this section. Thank you.

PART C.1 THIS SECTION CONTAINS A NUMBER OF STATEMENTS ABOUT SELECTED ASPECTS OF THE WORK OF PROGRAM SPECIALISTS.

How do you feel about each of the following statements concerning the work of Program Specialists? CIRCLE THE ANSWER WHICH BEST REPRESENTS YOUR OPINION.

SA means you strongly agree
A means you somewhat agree
N means neutral - you neither agree or disagree
D means you somewhat disagree
SD means you strongly disagree
DK means you don't know

1.	Program Specialists introduce innovative methods and approaches.	SA	A	N	D	SD	DK
2.	Program Specialists demonstrate adequate leadership for personnel involved in Special Education Programs.	SA	A	N	D	SD	DK
3.	Program Specialists provide services more efficiently than other special education personnel.	SA	A	N	D	SD	DK
4.	Program Specialists provide useful input in the development of Individualized Education Programs (IEP) for students.	SA	A	N	D	SD	DK
5.	Program Specialists play a beneficial role in providing appropriate educational services to handicapped students.	SA	A	N	D	SD	DK
6.	Program Specialists effectively coordinate those programs for which they are responsible.	SA	A	N	D	SD	DK
7.	Program Specialists currently have sufficient authority to perform their duties.	SA	A	N	D	SD	DK
8.	Program Specialists emphasize services which Resource Specialists do not have time or opportunity to provide.	SA	A	N	D	SD	DK
9.	Program Specialists would do a better job if they had smaller caseloads.	SA	A	N	D	SD	DK
10.	Program Specialists are a valuable resource for teachers and other school personnel.	SA	A	N	D	SD	DK
11.	Program Specialists are effective in observing, consulting with and assisting Resource Specialists, Designated Instruction and Services Instructors, and Special class teachers.	SA	A	N	D	SD	DK
12.	Program Specialists spend adequate time in evaluating effectiveness of programs for handicapped students.	SA	A	N	D	SD	DK
13.	Program Specialists are effective in planning programs, for handicapped students.	SA	A	N	D	SD	DK
14.	Program Specialists have enough time to perform their duties.	SA	A	N	D	SD	DK
15.	Program Specialists should all become school superintendents if they do a good job.	SA	A	N	D	SD	DK
16.	Program Specialists effectively coordinate curricular resources for use with handicapped students.	SA	A	N	D	SD	DK
17.	Program Specialists provide sufficient inservice to keep staff updated on educational changes.	SA	A	N	D	SD	DK
18.	Program Specialists are effective in assuring that students have full educational opportunity regardless of district of residence.	SA	A	N	D	SD	DK
19.	Program Specialists are given inadequate support from other school personnel to perform their duties.	SA	A	N	D	SD	DK
20.	Program Specialists should be advocates for the educational rights of handicapped students.	SA	A	N	D	SD	DK
21.	Program Specialists effectively provide leadership on the Educational Assessment Service (EAS) team.	SA	A	N	D	SD	DK
22.	Program Specialists are needed for the successful implementation of the Master Plan.	SA	A	N	D	SD	DK
23.	The work of Program Specialists results in the improved school performance of handicapped students.	SA	A	N	D	SD	DK
24.	Program Specialists are effective in insuring that handicapped students are placed in the regular classroom whenever possible.	SA	A	N	D	SD	DK

PART C.2 THIS SECTION CONTAINS A NUMBER OF STATEMENTS ABOUT SELECTED ASPECTS OF THE WORK OF RESOURCE SPECIALISTS.

How do you feel about each of the following statements concerning the work of Resource Specialists? CIRCLE THE ANSWER WHICH BEST REPRESENTS YOUR OPINION.

SA means you strongly agree
A means you somewhat agree
N means neutral - you neither agree or disagree
D means you somewhat disagree
SD means you strongly disagree
DK means you don't know

1.	Resource Specialists are effective in improving educational performance of handicapped students.	SA	A	N	D	SD	DK
2.	Resource Specialists provide services more efficiently than other special education personnel.	SA	A	N	D	SD	DK
3.	Resource Specialists provide valuable input in the development of Individualized Education Programs (IEP) for students.	SA	A	N	D	SD	DK
4.	Resource Specialists are effective in keeping teachers up to date on curriculum innovations.	SA	A	N	D	SD	DK
5.	Resource Specialists provide helpful consultation, resource information and materials to parents.	SA	A	N	D	SD	DK
6.	Resource Specialists have sufficient knowledge and experience in assisting students and/or parents.	SA	A	N	D	SD	DK
7.	Resource Specialists provide services which regular classroom teachers do not have time or opportunity to provide.	SA	A	N	D	SD	DK
8.	Resource Specialists would do a better job if they had smaller caseloads.	SA	A	N	D	SD	DK
9.	Resource Specialists are a valuable resource for regular staff members.	SA	A	N	D	SD	DK
10.	Resource Specialists provide useful information to handicapped students and their parents regarding instructional programs.	SA	A	N	D	SD	DK
11.	Resource Specialists effectively coordinate the special education services for handicapped students.	SA	A	N	D	SD	DK
12.	Resource Specialists provide services which regular classroom teachers do not know how to provide.	SA	A	N	D	SD	DK
13.	Resource Specialists have enough time to perform their duties.	SA	A	N	D	SD	DK
14.	Resource Specialists make useful revisions of IEPs.	SA	A	N	D	SD	DK
15.	Resource Specialists make it easier for regular classroom teachers to work with their bankers.	SA	A	N	D	SD	DK
16.	Resource Specialists are needed for the successful implementation of the Master Plan.	SA	A	N	D	SD	DK
17.	Resource Specialists should only work with students who are placed in special education programs.	SA	A	N	D	SD	DK
18.	Resource Specialists are given inadequate support from other school personnel to perform their duties.	SA	A	N	D	SD	DK
19.	Resource Specialists regularly make valid assessments of student progress.	SA	A	N	D	SD	DK
20.	Resource Specialists have sufficient understanding of the problems of regular classroom teachers.	SA	A	N	D	SD	DK
21.	Resource Specialists do not spend enough time in direct instruction with students.	SA	A	N	D	SD	DK
22.	Resource Specialists provide effective instruction and services for handicapped students.	SA	A	N	D	SD	DK
23.	Resource Specialists effectively refer students who do not make progress to the IEP team.	SA	A	N	D	SD	DK
24.	Resource Specialists are effective in insuring that handicapped students are placed in the regular classroom whenever possible.	SA	A	N	D	SD	DK

PART D. THESE QUESTIONS ARE ABOUT YOU AND YOUR PRESENT POSITION.

D.1 What is your present job title? ______________________________

D.2 Age
1. 25 OR YOUNGER
2. 26 TO 35
3. 36 TO 45
4. 46 TO 55
5. 56 OR OLDER

D.3 SEX
1. MALE
2. FEMALE

D.4 ETHNICITY (Optional)
1. AMERICAN INDIAN OR ALASKAN NATIVE
2. ASIAN OR PACIFIC ISLANDER
3. FILIPINO
4. BLACK, NOT OF HISPANIC ORIGIN
5. HISPANIC
6. WHITE, NOT OF HISPANIC ORIGIN

D.5 How familiar are you with the following laws related to special education?

	DEGREE OF FAMILIARITY (circle your answer)		
a) PUBLIC LAW 94-142 (Federal law: The Education for All Handicapped Children Act)......................	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
b) Old California Master Plan for Special Education (AB-1250)......................	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR
c) New California Master Plan for Special Education (SB-1870)......................	NOT FAMILIAR	SOMEWHAT FAMILIAR	VERY FAMILIAR

D.6 Is there anything else you would like to tell us about program specialists and resource specialists or about the questionnaire? If so, please use this space for that purpose.

Your contribution to this effort is very greatly appreciated. If you would like a summary of results, please print your name and address on the back of the return envelope (not on this questionnaire). We will see that you get it. THANK YOU.

APPENDIX E

Case Study Interview Schedules

APPENDIX E CASE STUDY INTERVIEW SCHEDULES

INTERVIEW QUESTIONS
PROGRAM SPECIALISTS/RESOURCE SPECIALISTS

Explain study as descriptive- trying to understand roles not evaluative

Length of time of interview
acknowledge will duplicate questionnaire-- in depth part

Thank for sparing time/aware of teaching constraints with time

Inconvenience of being observed

Results-- sign back of questionnaire

Confidentiality / taping

A. Activities

1) How long have you been working in your present position?

2) What other related work experiences have you had?

3) What is your educational training that relates to your present position?

    a) What other experiences such as internships/inservice training have you had that relates to your present position?

4) What is your work assignment (i.e. assigned to one/more than one school; responsible for all SH classes, etc.)?

5) Describe your activities as a RS./P.S.

Please include the percentage of time involved as you describe the activities as well as who you interact with .... How do you feel about this------?

Probes:

a) recipient of services

b) persons responsible for delivering services to child if they are not

c) persons with whom they coordinate in delivering services (e.g. Resource aides; regular classroom teacher; etc.)

d) Program Spcialists: Do you have any responsibilities for children placed in non-public settings? If so, what are they and how much time does this take?

e) What are your contacts with the R.S/P.S.?

B. Job Definition

1) Now that you have told me what you do, can you tell me what this looks like as compared to your job description?

   a) What is this description based upon?

   b) What are the factors that cause any differences?

   c) To whom are you accountable?

   d) What instruction are you given in your work?

   e) What things do you determine on your own (i.e. districts you work in; children/classrooms you aare involved with, etc.)?

   f) Are your activities similar to /or different from others in this district who do this job?

C. Efficiency

1) Even in the best of circumstances, problems do emerge. What are some of the problems that you encounter in your work that inhibit efficiency or keep you from spending your time in the best way?

2) Are there times when your work overlaps with what others are doing? (if so, explain)

3) What do you do that is different from wht others do? (In what way is your role distinctive?)

D. Effectiveness

1) In what areas of your work do you see yourself as most effective? (least effective?)

2) If you feel that you are less effective than you'd like to be, what are some of the barriers/problems you encounter?

3) How satisfied are you with your work? (what are the most/least satisfying aspects?)

E. Useful Experiences/Training for Present Position

1) In your beginning years as a P.S/R.S. what aspects of your

training or experience did you find most useful (least useful)?

2) What additional training/help would you like to be getting now that you have been on the job ___years?

3) What recommendations would you make in regards to training and experience to someone who is going into your field?

4) Are you aware that changes are occuring in the certification requirements for Resource Specialists? What do you think of this?

F. Recommended Changes

1) What changes would you like to see in your work as a P.S./R.S.? Why?

2) What changes do you think should be made in order that the needs of IWENS are better served?

INTERVIEW QUESTIONS -- Other School Personnel

Thank you for taking time out to be interviewed

Explanation of study: to attempt to understand how the R.S./P.S. function in their jobs (e.g. what they do; who they have contact with; how they and others feel about their work, etc.) it is not evaluative

Name of their Program Specialist: ____________________

Taping/Confidentiality

Length of interview: 30-40 min.

Results of study can be gotten by indicating it on back of questionnaire

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1. Have you had any contact with a Resource (Program) Specialist?

2. Can you tell me how this person functions in your school?

3. What services/contact have you had with the Resource (Program) Specialist?

4. Are you satisfied with how the Resource (Program) Specialist functions? (any services not performed which you think they should?; any services presently performed which are unnecess suggestions for changes in way services are provided)

5. Has the introduction of these new positions changed the way in which services are being delivered to children with exceptional needs?

6. Do you think the needs of children with exceptional needs would be served as well without these positions?

7. Do you think that other personnel could provide the same services?

8. (To Principal) How has this new role changed your workload/ responsibilities?